Easy Redmine

HelpDesk 2016

COOK BOOK

for complex settings

Content

Introduction

These manual will go through all the steps necessary to configure Helpdesk from the UI. From connecting mailboxes to Easy Redmine, through project settings, to fine-tuning the dashboards.

This is not a technical manual to configure Cron (or scheduled tasks on the server side). Cron must already be configured in order for Helpdesk to function. Instructions to set Cron are [here.](#)

0. Terminology

Let's first start with a glossary of used terms in the following manual.

Mailbox - an email address connected to Easy Redmine, from which received emails are processed into tickets in respective helpdesk projects
Ticket - task created from a received email in a mailbox, or a task internally created by clients in a helpdesk project
Heldpesk project - a project connected to Helpdesk, where tickets can be created
Domain - the second part of an email address. For example from email worker.Joe@client.com domain is just client.com
Keyword - word or a string of words contained in the **mail subject**
SLA - service level agreement. A simplified meaning used in Easy Redmine, contracted time to react by company to tickets submitted by client. Calculated in hours
Original email - Email sent to a helpdesk mailbox from which the ticket was created
Operator - this terms is going to be used for the support worker, who works with the tickets

1. Decide on the structure of helpdesk projects

Depending on whether you want to have a single project for the all tickets or differentiate between helpdesk mailboxes, or even have special projects for different clients, you need to decide on the structure of the projects before any configuration starts. This decision will affect some further steps listed in this manual.

Here are the possibilities:

1.1. Single project for all tickets

If you are only going to have one project, which gathers emails from a single mailbox, there is no decision to make >> **all emails sent to the mailbox create tickets in the same project.**

<u>Example</u>*: All your clients send support requests to support@mycompany.com*

It doesn't matter at which level this project is, basically it lives its own life within any part of your project structure. However, if you are planning to start with a single project and later continue to expand helpdesk, you should see the options below.

1.2. One mailbox, more helpdesk projects

Example: You use the mailbox support@mycompany.com. All emails received go into a general project. But you have one client, who has a special project and special conditions > emails FROM domain client.com are processed in the special project.

Of course you can have more than one customers separated this way. In this case the project structure may look like this:

Help Desk - Support	Root project of Help Desk Projects
1 - Default Help Desk	Sample General Help Desk Project
Bohemia Sun - Support project	Sample Help Desk project for customer with SLA
Trains Français - support project	Sample Help Desk Project for customer with SLA

Another option is to have the Default helpdesk project on the first level and the special projects beneath it.

A different way, which sometimes may be used is a structure:

>Client1

>>Project for commerce

>>Project for implementation

>>Project for Helpdesk

>Client2

>>Project for commerce

>>Project for implementation

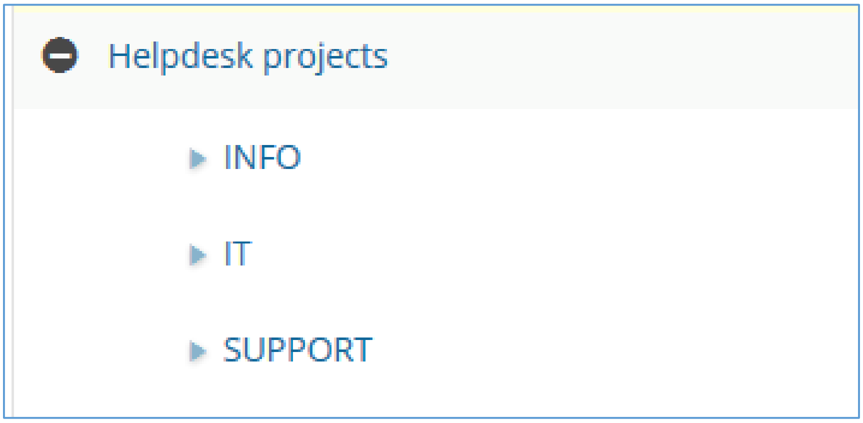
>>Project for Helpdesk

However, this is not recommended if you are planning to gather tickets from various problems to some aggregate lists, statistics or summaries.

1.3. More mailboxes, no special client projects

Example: You are using mailboxes support@mycompany.com, info@mycompany.com, it@mycompany.com and emails are only sorted according to the mailbox, not according to the sender.

In such case you can have the 3 projects on the same level and possibly beneath a main project covering them all.



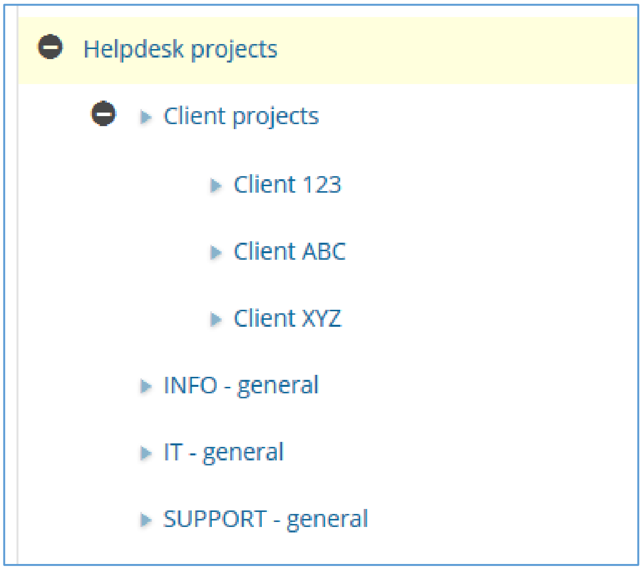
If you these projects will be completely unrelated and falling to separate sections of your organization, they can be in different project trees (under different main projects).

1.4. More mailboxes, with special client projects

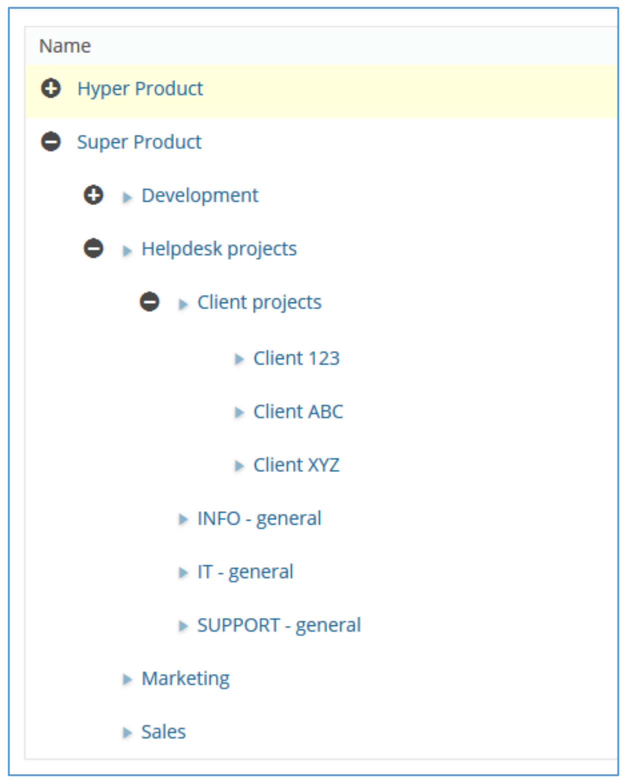
Current Easy Redmine HelpDesk functionality allows to separate clients solely by the sender and not by combination of sender and receiving mailbox.

<u>Example:</u> You are using mailboxes support@mycompany.com, info@mycompany.com, it@mycompany.com. You have a special client sending support requests from domain client.com

The recommended structure is:



When we return to the project structure in general, there is some further consideration to be done. If you are aiming to integrate helpdesk processing with a different department of your organization (for example development), you may want to consider putting helpdesk projects a little bit deeper in the project structure.

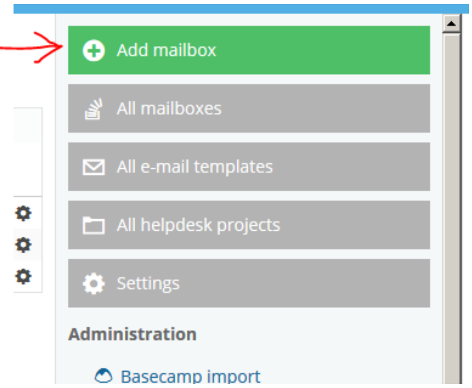


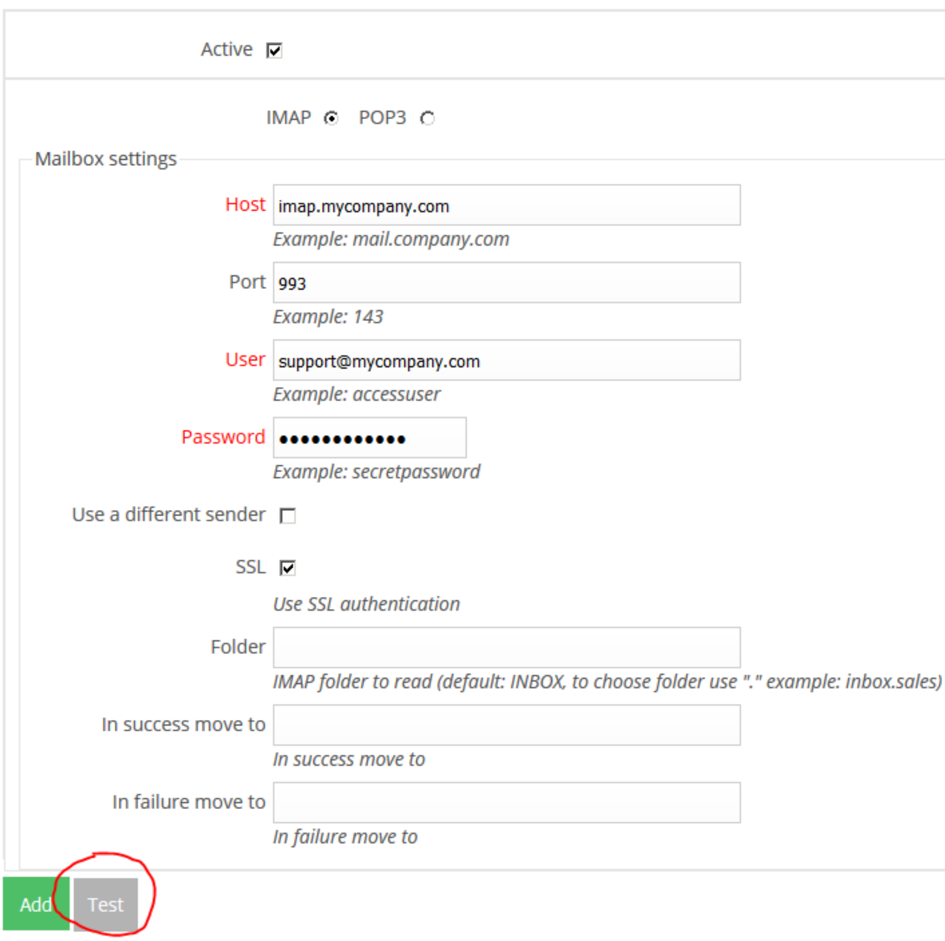
Correct project structure will enable you to generate various reports, listings, statistics across more phases of your business.

2. Connecting mailbox to Easy Redmine

Now we can start with the actual setup of Helpdesk components. To have Easy Redmine process mailboxes, they need to be connected in the following way.

2.1. Administration >> Helpdesk >> All Mailboxes >> Add Mailbox





2.2. Enter valid credentials of your mailbox - click Test **to make sure Easy Redmine can reach the mailbox**

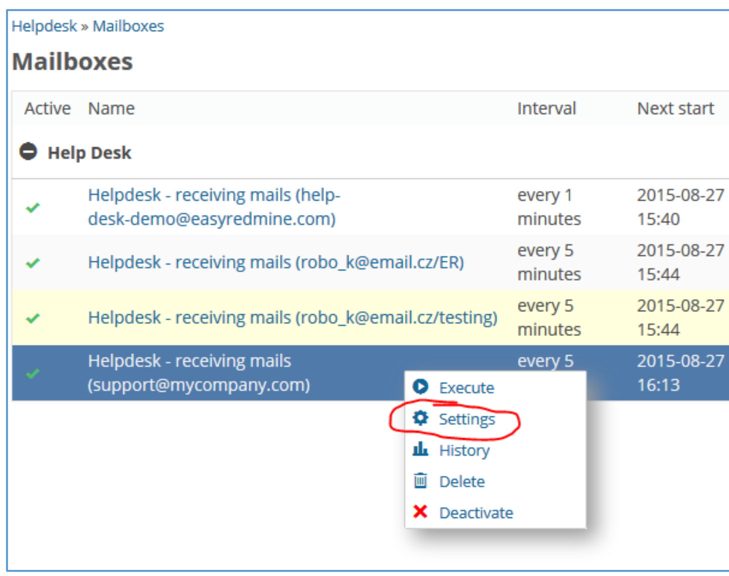
Setting notes:

- Active - mailbox is scanned regularly by Easy Redmine for new unread messages. If disabled, Easy Redmine doesn't check the mailbox. But you can keep the mailbox in Easy Redmine for possible future use.
- Use different sender - if you want replies from helpdesk to have a different FROM address.
- SSL - if you use an SSL certificate on your mail server
- Folder - if you want Easy Redmine to only check certain folders for unread emails.
- In success move to - if an email is processed correctly by Easy Redmine (ticket has been created), it will be moved there
- In failure move to - if an email is processed incorrectly (ticket has not been created), it will be moved there

After testing connection, click Add.

2.3. Configure frequency of mailbox scanning.

Right click on the mailbox and choose Settings



Now you are back to the mailbox settings, but with an additional setting. By default it is set to Every 5 minutes. But it is generally recommended to have this setting around every 10 minutes. If you have many mailboxes connected to Easy Redmine, this automatic scanning task may take a longer time and overload your server with too frequent scans, which will slow down the whole application.

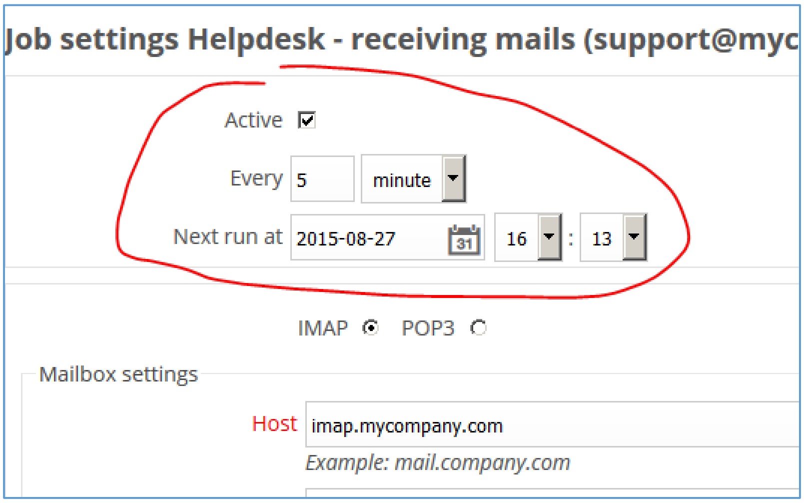
Button notes:

Execute - manually start the mailbox scanning

History - view past mailbox scannings

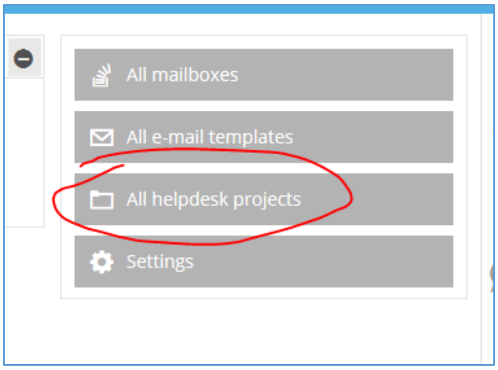
Delete - remove mailbox from Easy Redmine scanned mailboxes

Deactivate - deactivate automatic mailbox scanning



3. Project configuration

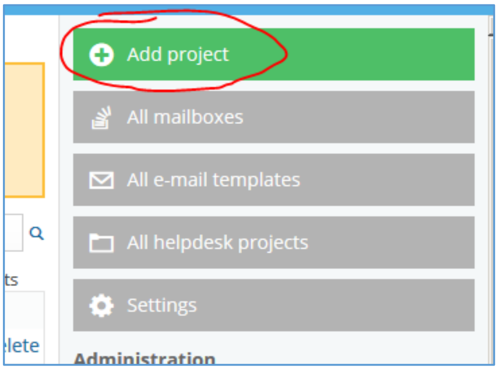
Mailbox is connected and scanned by Easy Redmine, but so far we haven't set where the tickets should be created. Before a project is connected to helpdesk, tickets cannot be created because, in general, every task requires a project.



This part is going to be split into different scenarios, according to the aim of each project.

3.1. Default project for mailbox

In the past chapter examples, this would be projects *Default Held Desk, INFO - general, IT - general, SUPPORT - general,* i.e. not restricted to a particular domain of the sender.



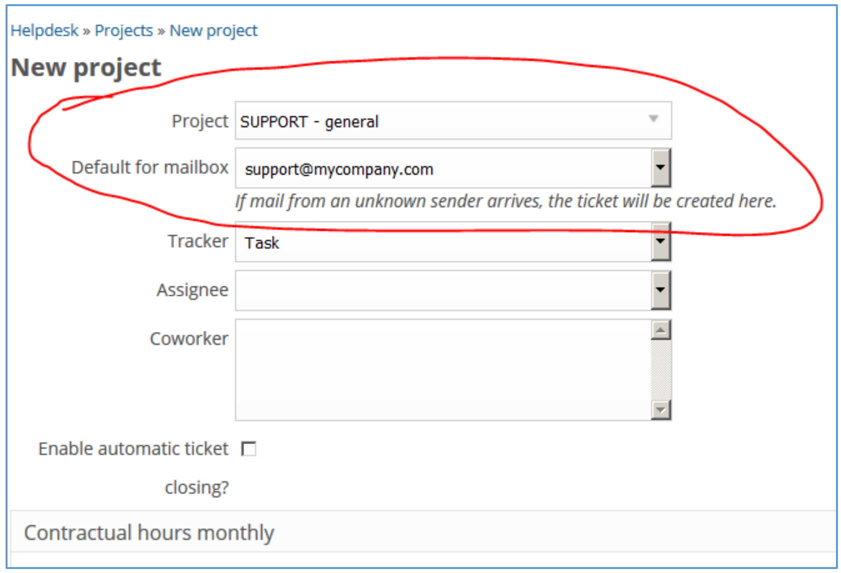
1. In Helpdesk, All helpdesk projects >> Add project

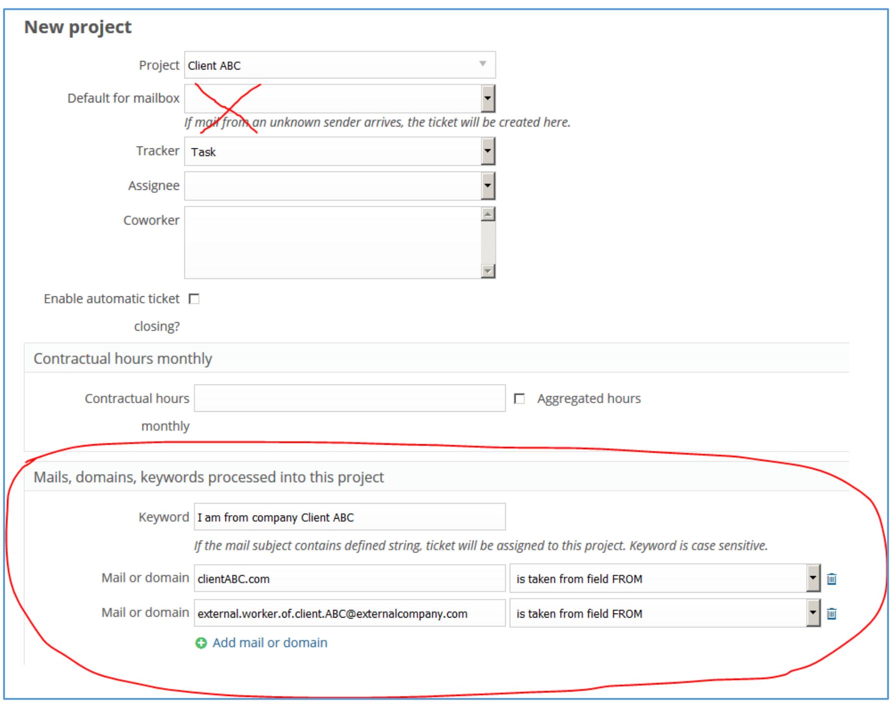
2. Select the project

3. Select the mailbox for which the project will be default

4. Scroll down and **Save**

Complete explanation of all helpdesk project settings will follow further in this chapter.





3.2. Special client project

From the examples in Chapter 1, these would be the projects: *Bohemia Sun, Trains Francais, Client 123, Client ABC, Client XYZ, Client 1>>Project for Helpdesk, Client 2>>Project for Helpdesk*

1. In Helpdesk, All helpdesk projects >> Add project
2. Select project
3. Fill in the fields highlighted below. Setting notes are under the screenshot
4. Scroll down and **Save.**

Setting notes:

- Default for mailbox - **DO NOT** select any mailbox if you want to set this project as a special client project
- Mails, domains, keywords processed into this project - all the settings in this section are with **OR** operator, which means that **if at least one condition is met, ticket is created in this project**
- Keyword - In this example, if an email received in **ANY** helpdesk mailbox contains the whole string *I am from company Client ABC,* ticket will be sorted into this project
- Mail or domain - incoming emails are scanned for these values in FROM field of the email. In this example, the sender can be anyone with mailbox ending with clientABC.com or it can also be a specific person with a different email, but we want his tickets to be sorted in this project

Complete explanation of all helpdesk project settings will follow further in the next chapter.

IMPORTANT: It is not the best practice to have one project set both as *Default for mailbox* AND specified for a certain mail or domain. Any sender will have their tickets created in this project, so you don't need to specify them. This kind of setting may cause confusion.

3.2.1 Closing and archiving special client project

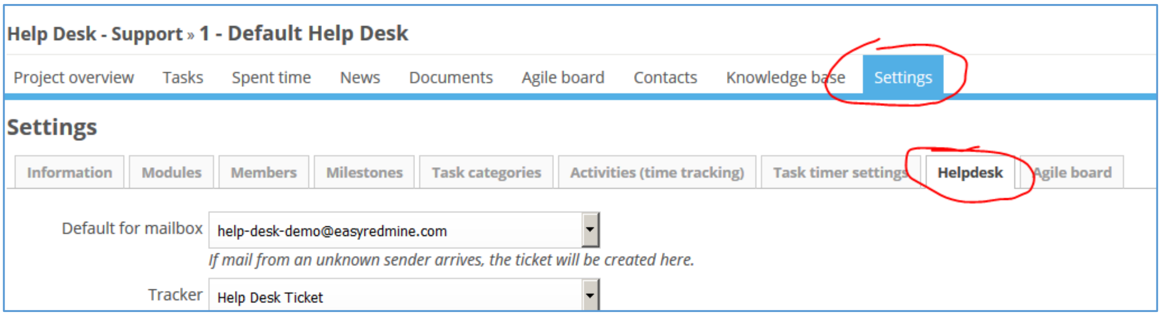
When such a project is closed (in effect becoming read-only), it will no longer be possible to create tickets from within. Therefore, this project will cease to be a special client project and emails coming from domains set in the helpdesk settings will be processed as unknown and fall in a general helpdesk project.

The same goes to archived projects.

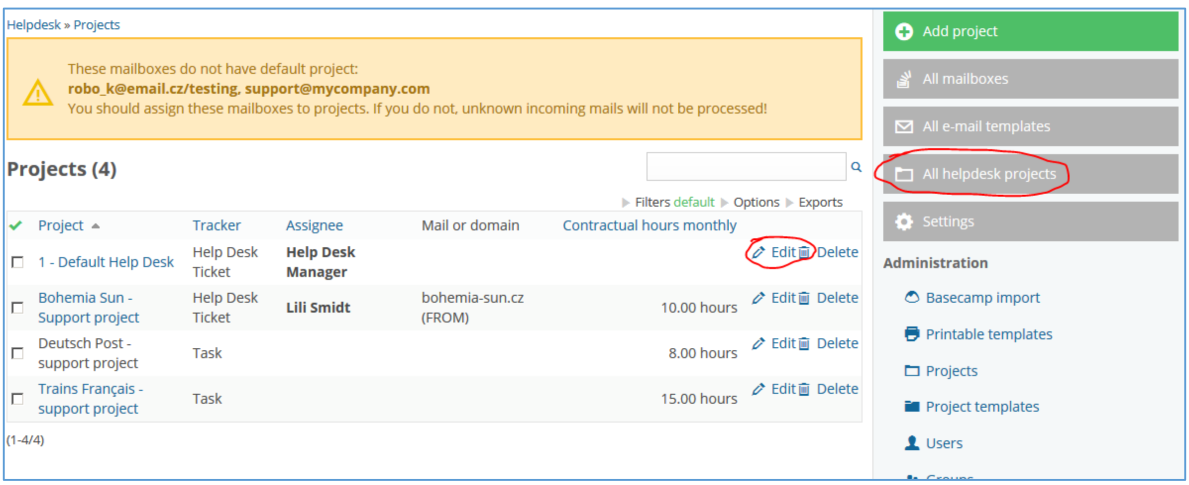
4. Project configuration - details

Now that we differentiated types of projects which can be used in Helpdesk, we can continue to explain the rest of the project settings. Once a project is connected to helpdesk, there are two ways to get into the project helpdesk configuration page.

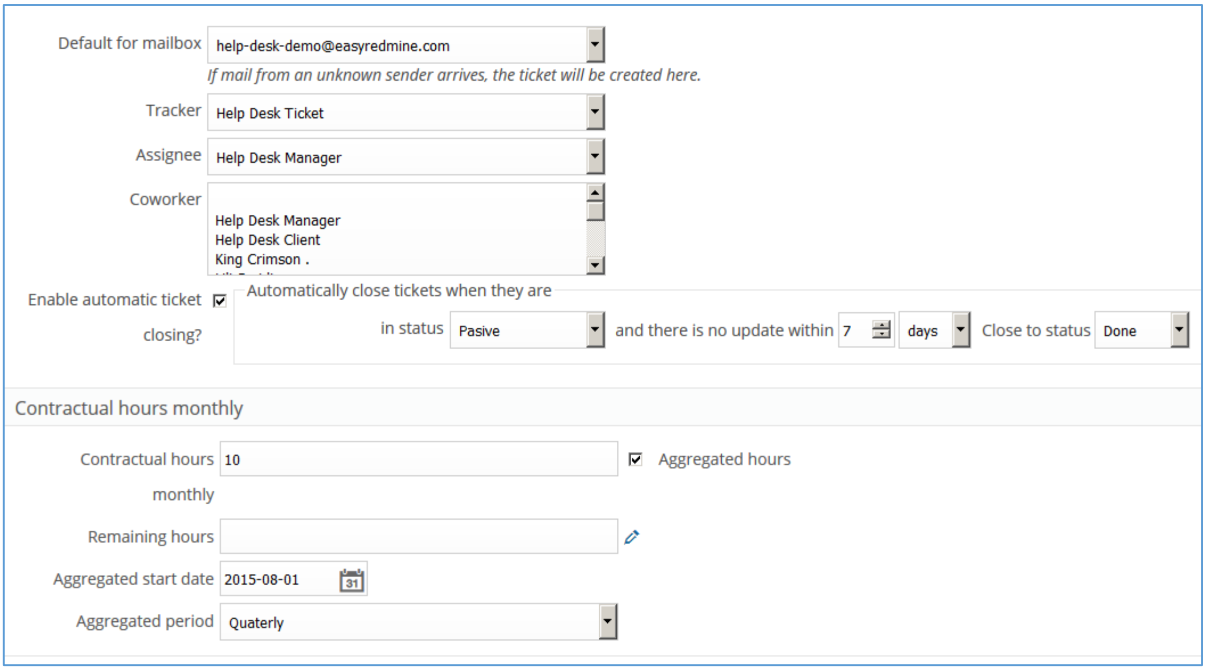
- Administration >> Helpdesk >> All helpdesk projects >> Edit



- Project settings >> Helpdesk



4.1. Basic settings



Setting notes:

- Tracker - new tickets in this project will be created with this tracker
- Assignee - new tickets in this project will be assigned to this user
- Coworker - new tickets in this project will have these coworkers (multiple selection possible)
- Automatic ticket closing - depending on your workflow, there may exist some tickets which are factually resolved, being kept open. For such cases, you can set automatic closing according to the status and duration of non-update
- Contractual hours monthly - this is setting should be used only for special client projects, where clients have prepaid a certain number of hours of support per month

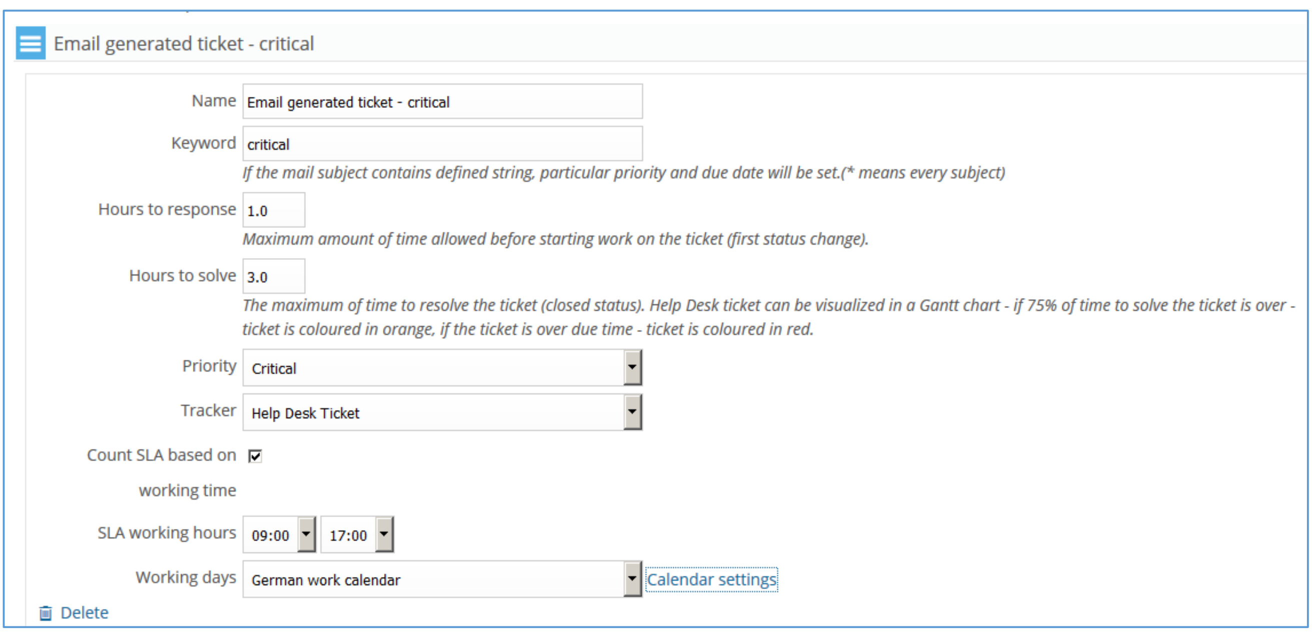
- Aggregated hours - the contract with the client may have the option of transferring unused hours from previous month to the next one. If client has 10 prepaid hours, but used only 7 of them during May, 3 hours will be transferred to June
- Remaining hours - how much is left. The pencil button allows to manually clear remaining hours - set to 0
- Aggregated start date - when the prepaid period begins
- Aggregated period - for what time period are the hours aggregated before they are reset to the original Contractual hours. If there are still 13 hours remaining by the end of the quarter (end of the quarter is determined by aggregated start date), they will not be transferred to the new quarter. The hours will be reset to 10

The hours at hand are spent time entries in the project. Which exact entries will be explained further in this manual.

4.2. SLA

This is an important metric of any helpdesk project, but especially for special client projects where SLA violation may be sanctioned. As was mentioned before, tickets may be created by email or directly from within the system by clients with specially restricted access to a helpdesk project. Both cases have a slight nuance in the SLA setting.

4.2.1. SLA for email generated tickets



Setting notes:

- Name - Title of the SLA (for better SLA administration in the helpdesk project)
- Keyword - **must be filled if SLA is being set for email generated tickets**. In this case there is a specific keyword, which, if contained in the subject of the email, ticket will be given the specifications of the SLA (hours, priority, tracker)
- Hours to response - deadline until which the first status change of the ticket must take place. Status change indicates that ticket has been acknowledged and client has been informed about it
- Hours to solve - deadline to close the ticket >> put it into a closed status
- Priority - new ticket from email containing the keyword will have this priority
- Tracker - new ticket from email containing the keyword will have this tracker. This is helpful for example, if the client has found a defect in the product and wants to report it directly as a defect and not as a standard request for support. The client would therefore write with subject for example *Defect* - and the ticket won't have to be classified by the helpdesk manager.
- Count SLA based on working time - SLA deadlines will not be set for non-working days or hours of the day. Some SLA may be limited only to working hours, but others can be set to 24/7
- SLA working hours - time frame for SLA
- Working days - working calendar where weekends, holidays and other non-working days are registered

4.2.2. Ordering of SLAs

With more levels, keywords and keyword strings, it is important to keep order correctly. The mail subjects are checked for keywords according to the order in the helpdesk settings.

Example: You have contractually defined keywords for "Critical" and "Critical bug", each of them has a different SLA. You need to make sure the two subjects will be differentiated when the emails are processed.

In this case you need to put the SLA "Critical bug" above "Critical". The mechanism of the mail subject processing is simple:

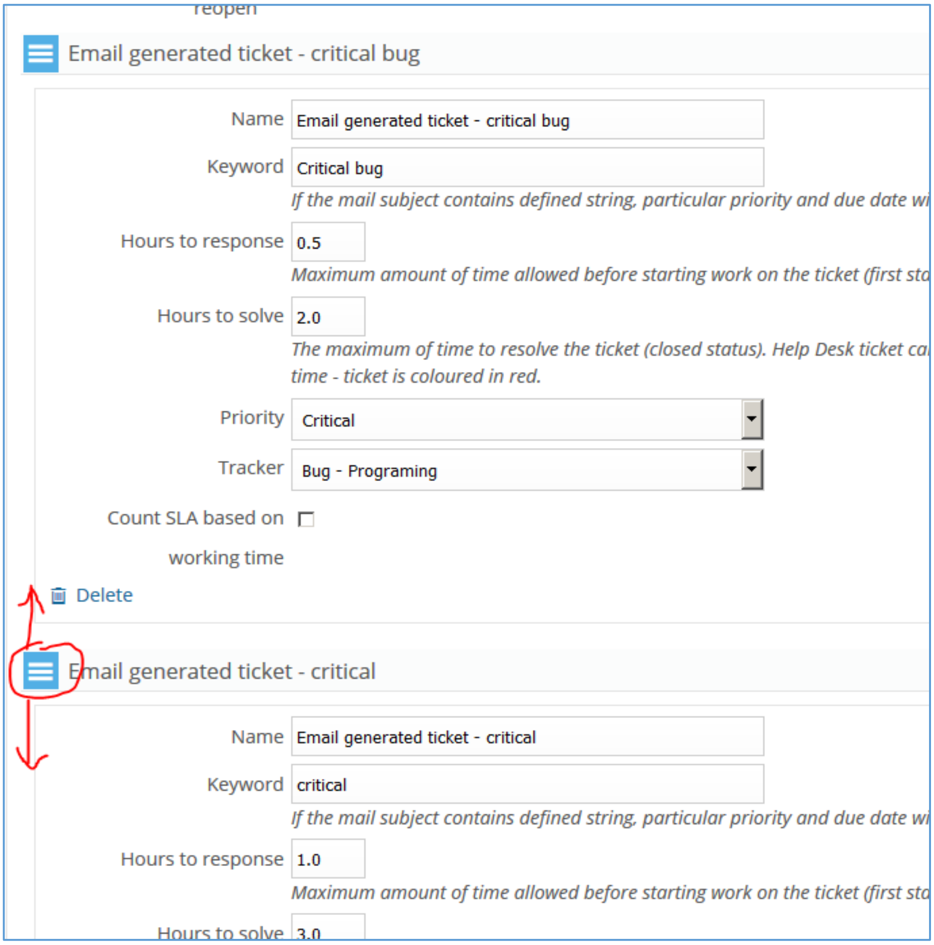
Search for "Critical bug" in the mail subject

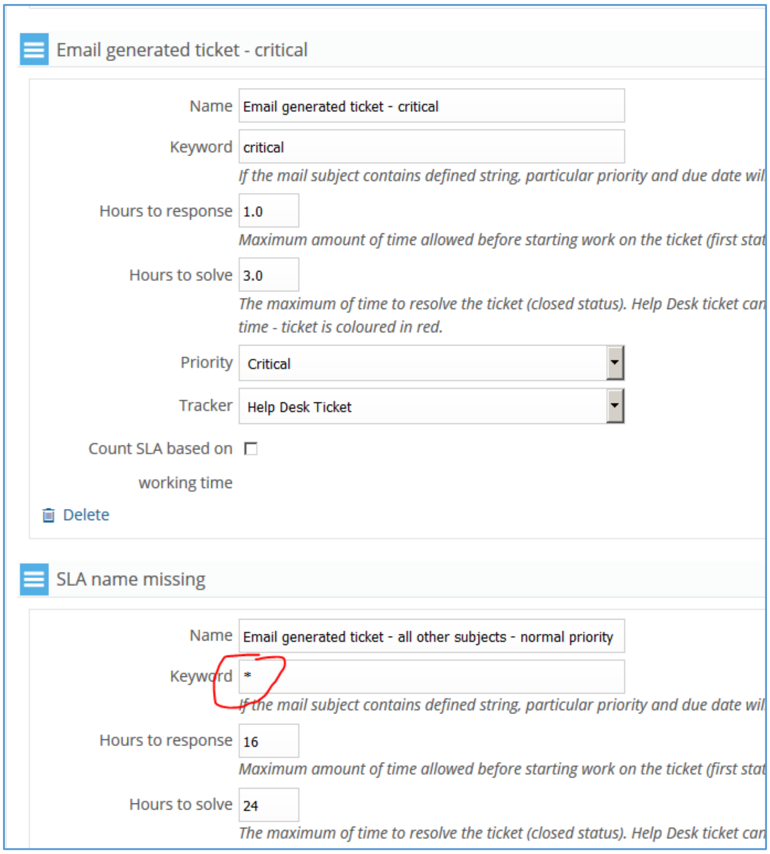
If the above string is not in the subject, search for the next one, in our case "Critical"

If the above string is not in the subject, continue searching for further keywords

*The last SLA must be the general (for unspecified level) keyword using the * mark for all subjects*

If you put "Critical" before "Critical bug", it would mean that emails with "Critical bug" in the subject will be processed incorrectly, because they would fall under the "Critical" SLA.

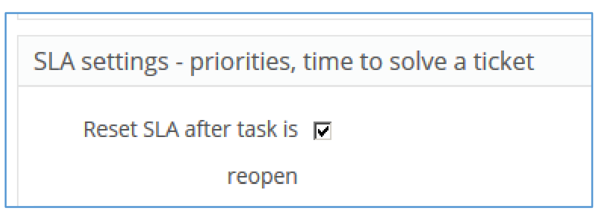




In general, the more specific keyword string, the higher its position should be.

4.2.3. Resetting SLA for closed tickets

You will also notice a setting right at the top of SLA section.



When enabled, tickets which were once closed and are reopen by another reply from the client, will have SLA counted as if they were new - from time of the client's reply which reopened the ticket. *Example: Ticket #1234 was open on Monday at 16:00. SLA is 48 hours => time to resolve is until Wednesday 16:00. Ticket was closed by an operator on Tuesday at 10:00. Client replied again that he needs more information on Tuesday at 14:00. Ticket #1234 now has new SLA set for Thursday 14:00.*

When disabled, SLA will always be counted from the original time when the ticket was created.

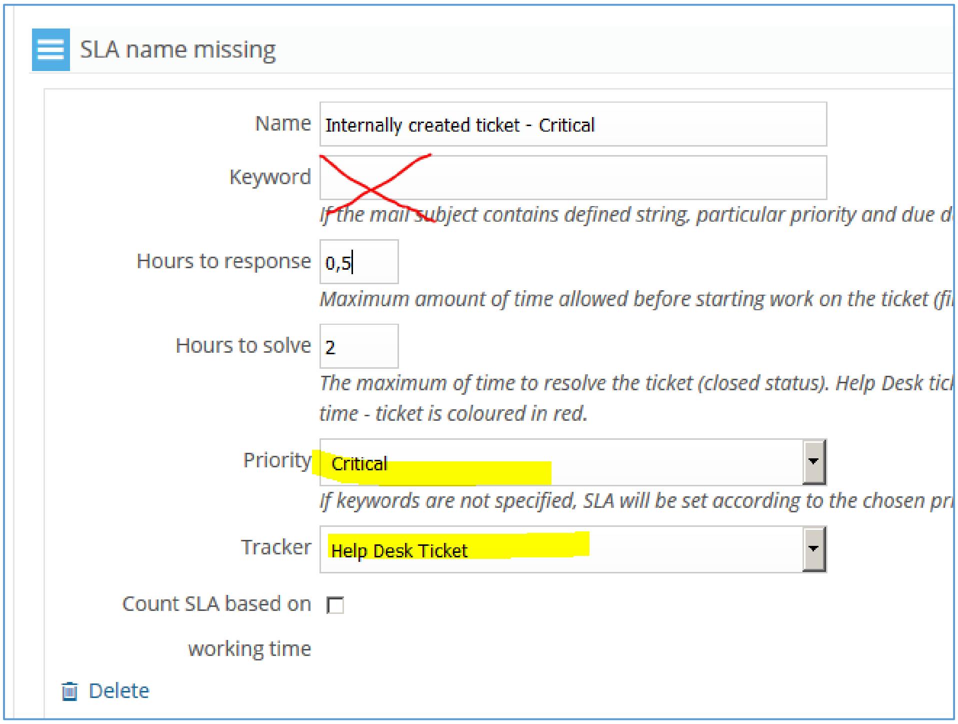
Example: In the scenario from the first case. After client's reply on Tuesday at 14:00, SLA will not be reset and would remain on Wednesday 16:00. The same goes when the client reopens the ticket on Thursday. The ticket would now be highlighted as overdue.

From the last note it is evident that this setting should only be disabled on projects, where the tickets are simple and resolving can be strictly defined, so there is no reason to reopen the tickets from the client's side.

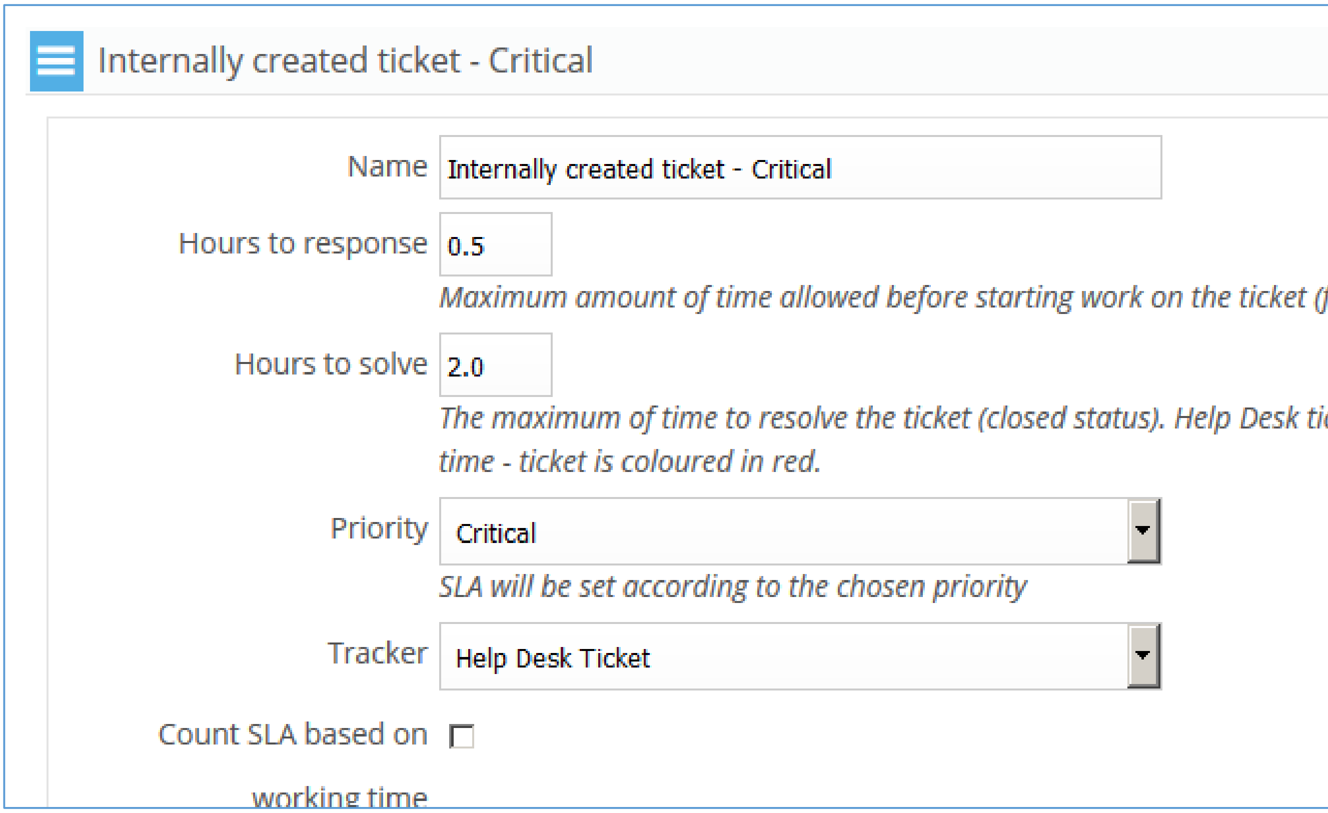
4.2.4. SLA for internally created tickets

As was mentioned before, tickets may not be created only from emails. Easy Redmine has an advanced access level control, which allows providing your clients direct access to the system with restricted permissions (to create tickets, edit tickets, read news, etc.).

Tickets created like standard tasks by logged-in users have a slightly different way of determining SLA. Because there are no emails processed, you can't determine the SLA by keywords. Let's explain this on the image below.



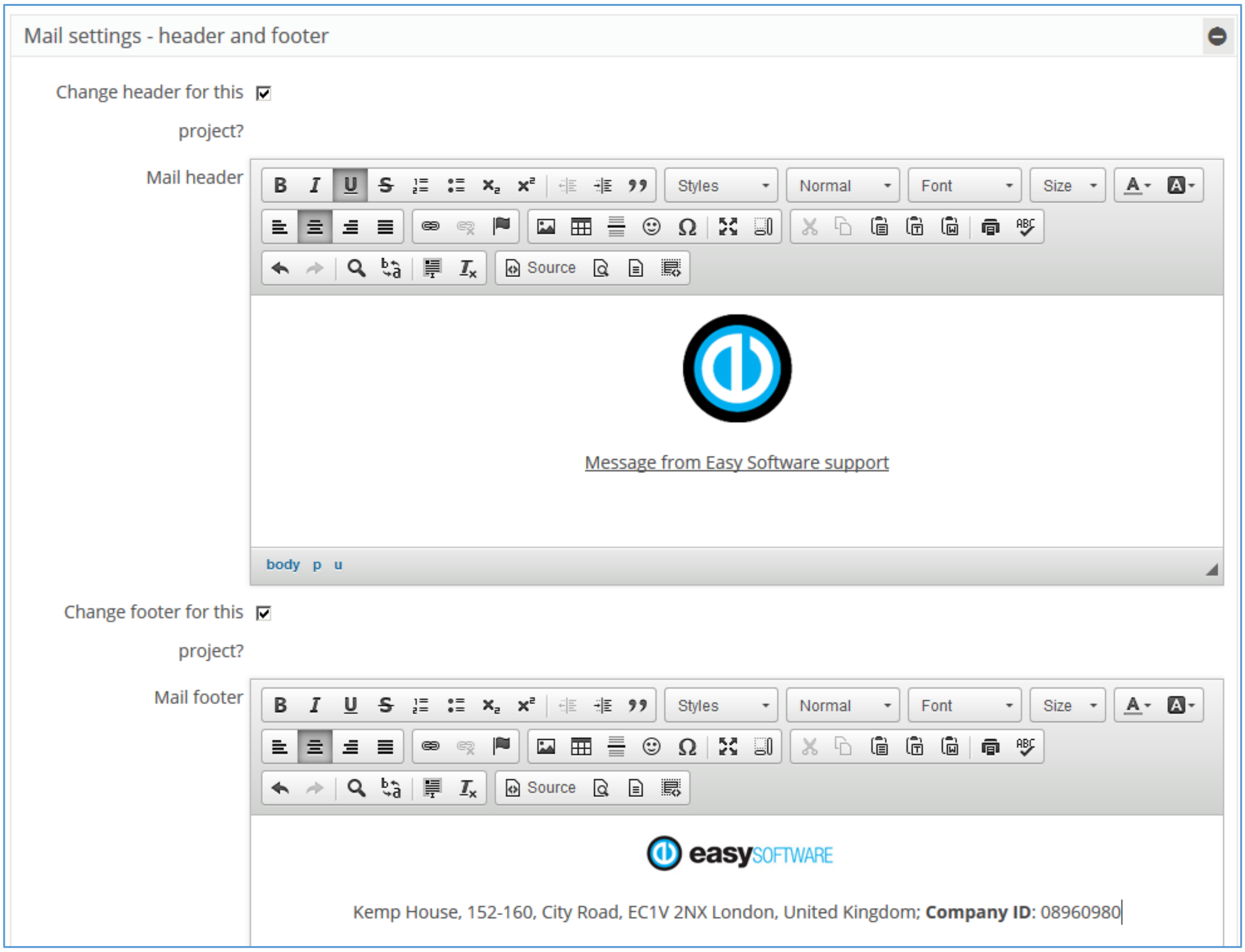
When creating SLA for internally created tickets, leave the Keyword blank. SLA will be determined by combination of Priority and Tracker. When you save the settings, the Keyword will disappear, indicating that this SLA is used for internally created tickets.



By configuring workflow effectively, you can restrict clients to only create tickets in certain trackers, even if the project contains more of them. You can for example only allow clients to only use tracker Help Desk Ticket and Bug, so you can only set SLA for these trackers. All other trackers wouldn't not require SLA setting, because they would not be submitted by clients and therefore would not be considered as helpdesk tickets.

4.3. Custom header and footer

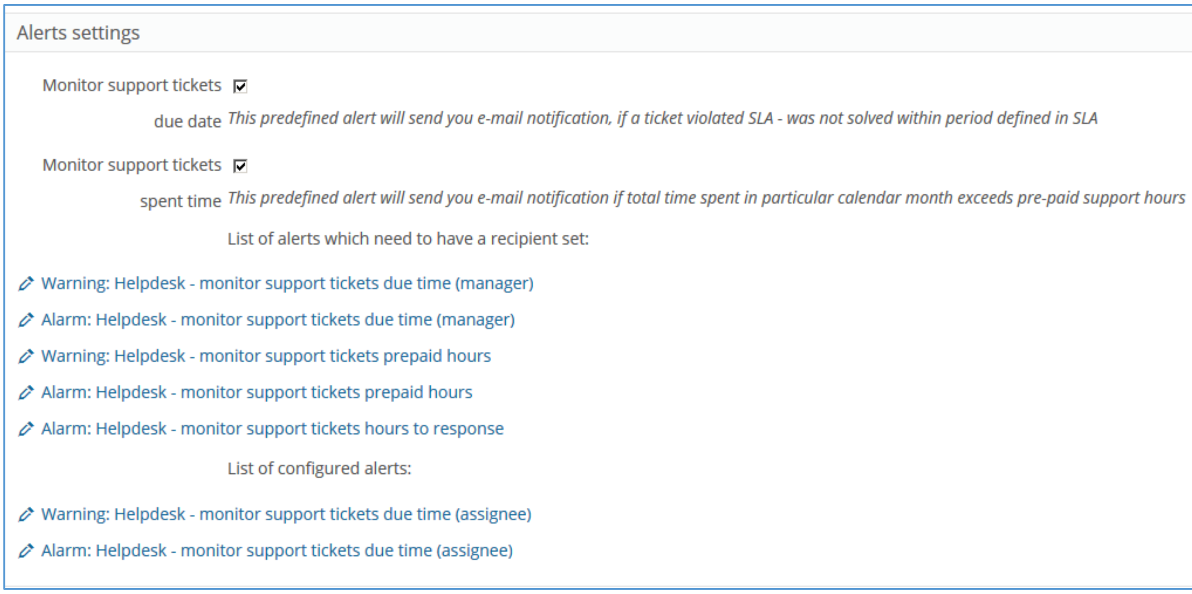
This setting concerns helpdesk email communication, i.e. communication in email generated tickets. You may customize emails from different helpdesk projects, whether it is for corporate identity use, for terms specifications or even confidentiality disclaimers.



4.4. Alerts

In order to prevent SLA from being violated, there is the possibility to use automated alerts, which notify concerned personnel about looming problems in form of delayed tickets.

Another type of Alerts watch the amount of time spent on projects, where clients have prepaid a specific amount of hours of support (as explained in chapter 4.1).



<u>Setting notes:</u>

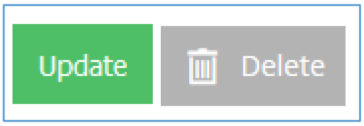
- Monitor support tickets due date - to be more precise *Due Time* according to SLA. If enabled, alerts will be generated when SLA deadline is nearing. Further settings are explained below
- Monitor support tickets spent due time - watching of spent time on projects with specified prepaid monthly hours
- List of alerts which need to have a recipient set - these are preconfigured alerts, which only need to enter an email address, where the notifications should be sent
- List of configured alerts - alerts with no missing parameter
- By clicking on each alert, you will see the preconfigured parameters with possibility to edit them

- Warning/Alert: severity of the notice
- Support tickets due time - alert watches SLA resolve deadline (ticket closing)
- Support tickets hours to response - alert watches SLA response deadline (first change of status)
- Support tickets prepaid hours - alert watches spending of prepaid monthly hours on the project

Hours watched in the last alert are those which are logged on tickets, which are in trackers mentioned in the project helpdesk settings.

Example: Default tracker for the project is Help Desk Ticket. Some SLA is configured for the tracker Bug. The project contains other trackers (Task, Feature development), which are not used on tickets. In such case, the prepaid hours are only valid for Help Desk Ticket and Bug. Spent time on other trackers is not taken into account for this alert.

4.5. Save/delete



Update - save changes made in the helpdesk settings of the project

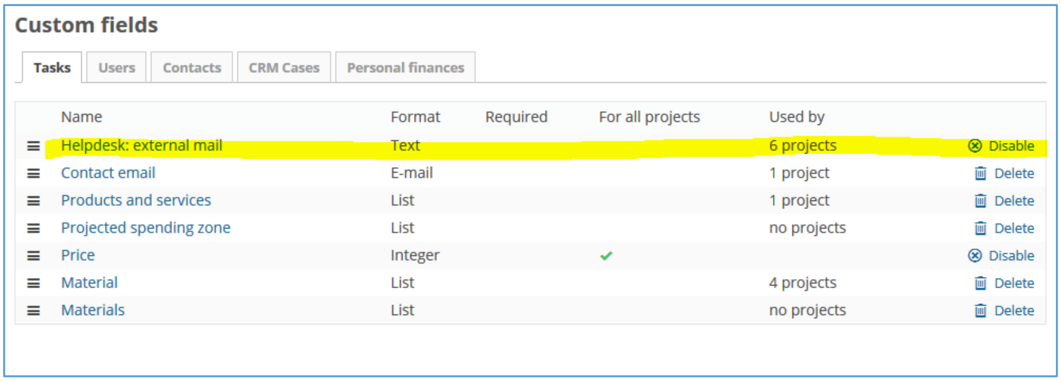
Delete - remove project from helpdesk. This doesn't mean deletion of the project as a whole, it will only **remove connection of the project to helpdesk.**

5. Ticket processing

After explanation of huge amount of settings, it is time to look at some practical implications, before we get back with another set of settings. We will start with a simple use case to demonstrate how the ticketing works and skip some features. They will be explained later on.

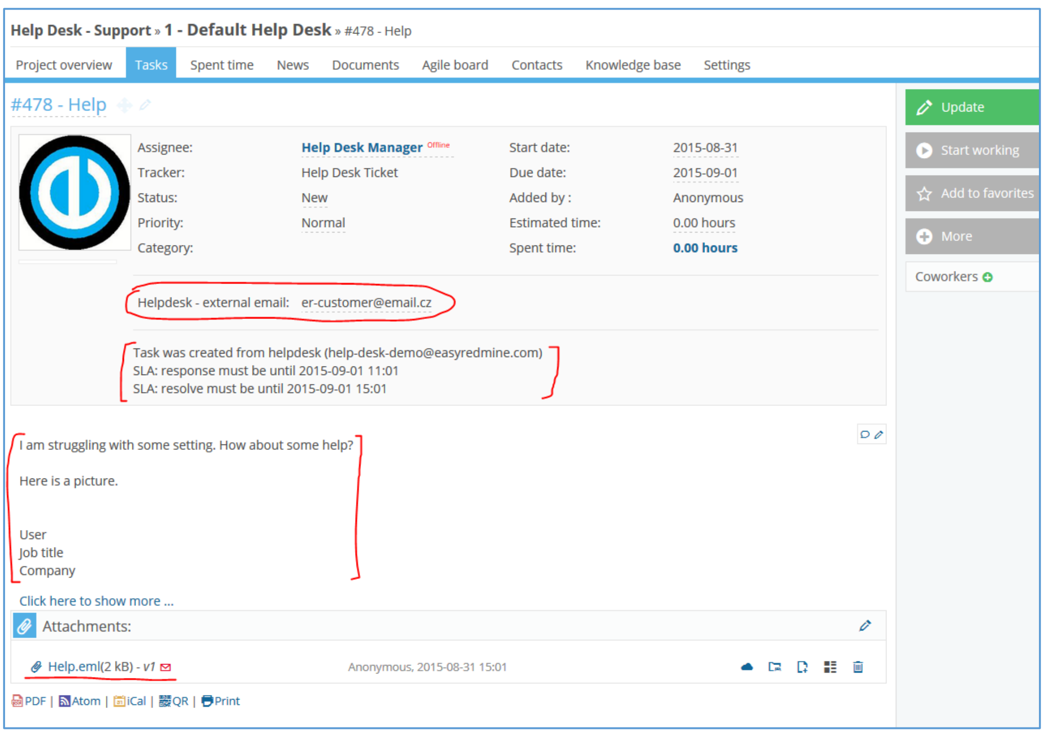
5.1. Email generated tickets

For correct handling of tickets created by email, you need to check that custom field Helpdesk: external mail is active. You can check it administration >> custom fields >> tasks.



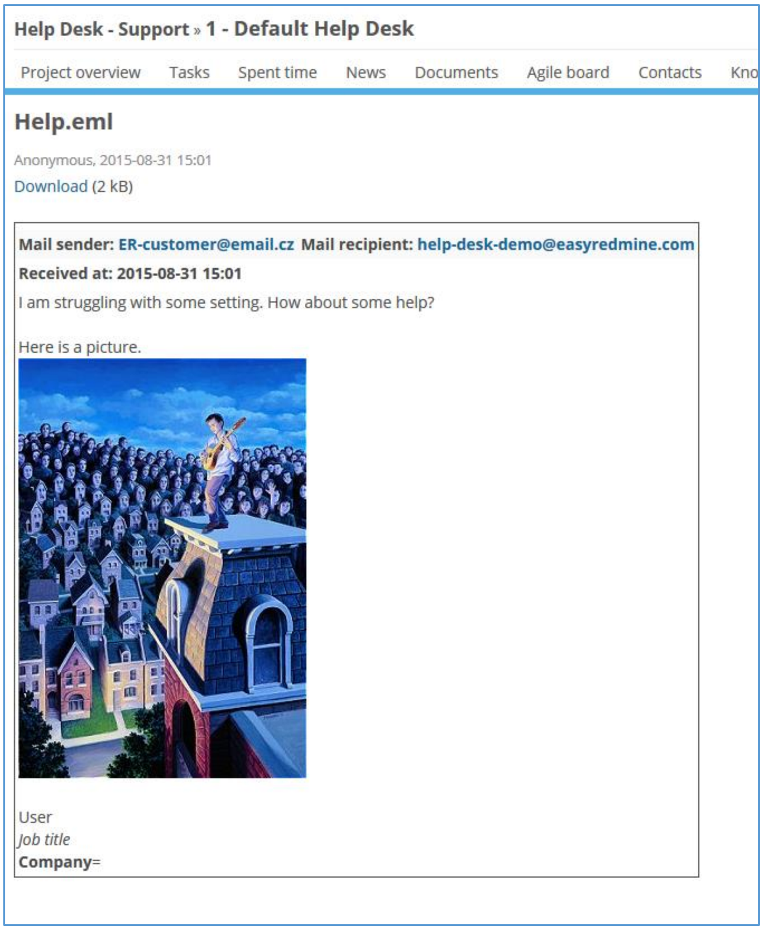
If this custom field is missing, it must have been removed from database manually. In such a case contact support@easyredmine.com.

5.1.1. Email is processed by Easy Redmine and ticket is created in the determined project

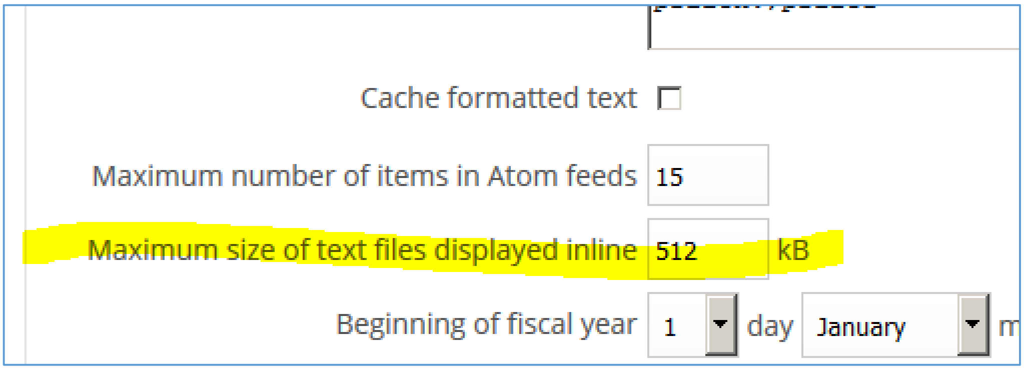


Notes:

- Helpdesk - external mail: The sender of the email form which the ticket was created
- Specification of the mailbox, from which the task was created
- SLA values - if violated, they are highlighted in red
- Parsed email - This is the text content of the email. Images are not shown directly in this view, due to performance optimization (especially when the ticket has a lot of replies and each one contains a signature with company logo, the ticket would take painfully long to load due to increasing size of each of the next replies)
- Full email available as attachment - if the original email contains images, you can view it directly in Easy Redmine.

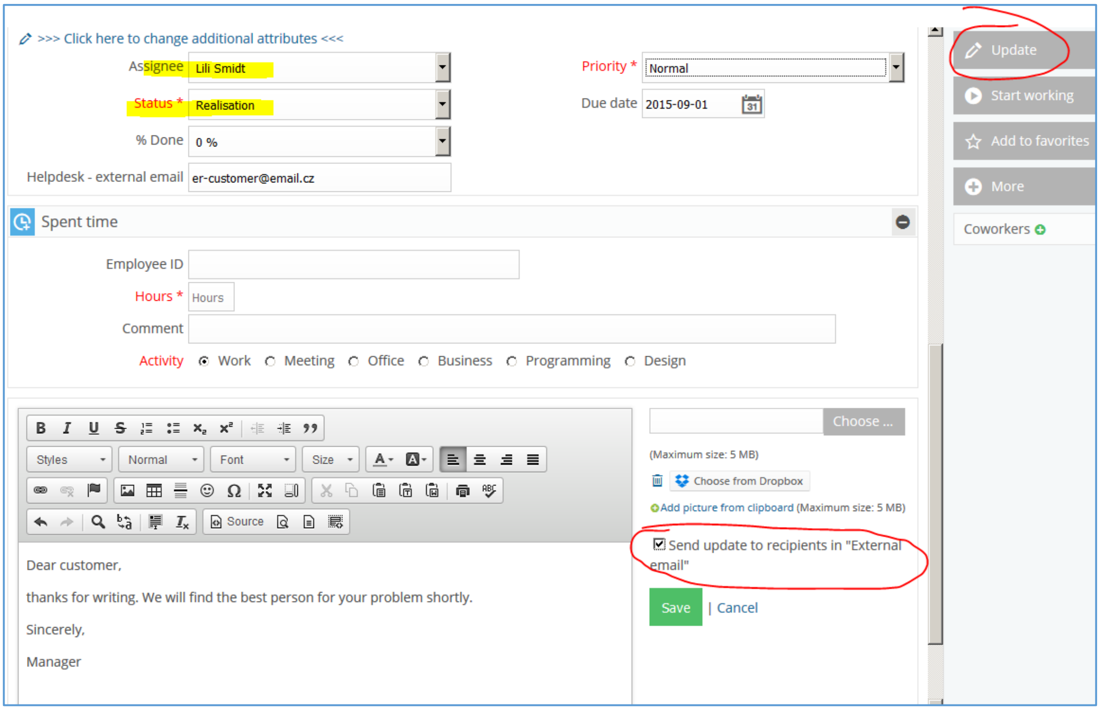


If the email is too large to view in Easy Redmine, you can open it in your mail client. Size limit for opening of email in Easy Redmine can be set in administration >> settings >> general.



5.1.2. Write a reply and update the ticket

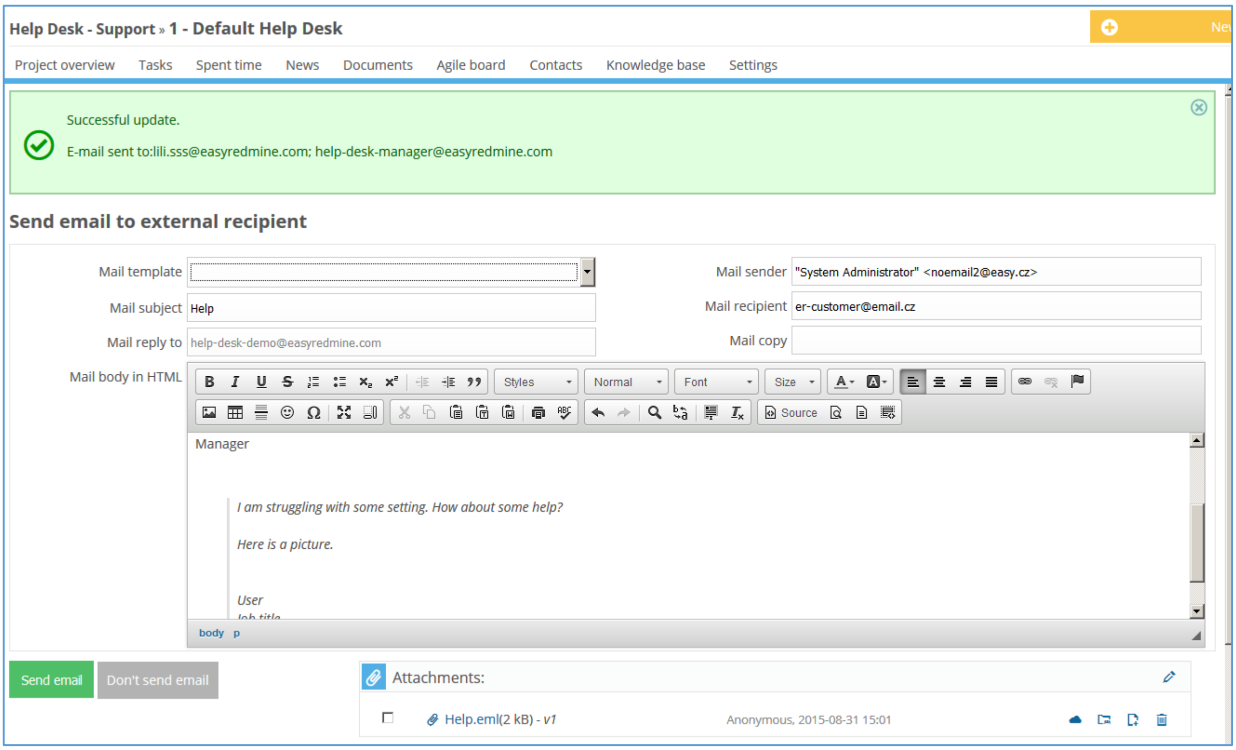
To meet SLA response, we need to change the status and reply to the client for the first time. For the following examples, keep an open mind about the ticket communication, it is just to demonstrate how the communication works technically.



The manager wrote a reply to the customer about receiving the ticket, assigned it to an operator and changed the status. Reply will be sent to the client (external email) when you check the box.

5.1.3. Send update to external email

By hitting Save, you will save the updates made on the ticket and you will get to the dialogue of sending the reply to the client.

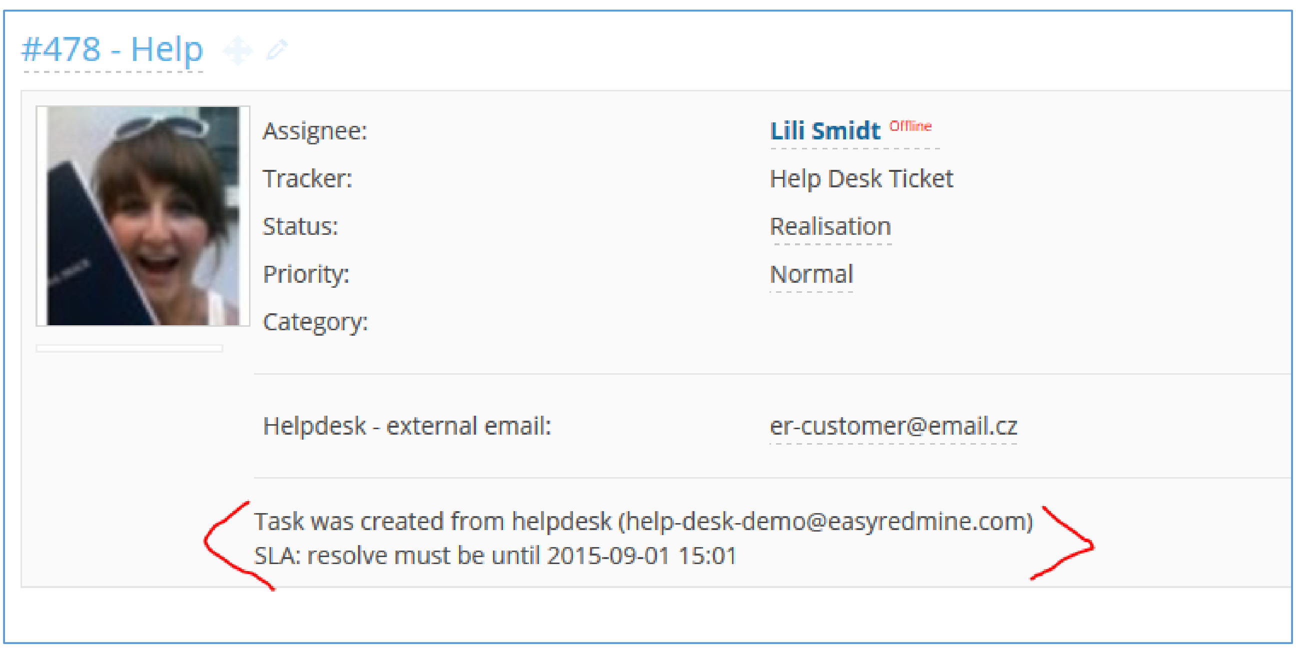


<u>Notes:</u>

- Mail template - if you have email templates configured, you can choose one. Or a template will be preset according to status. This feature will be explained in further chapters
- Mail sender - this will be shown to the client as FROM. Setting of population of this field will be explained in further chapters

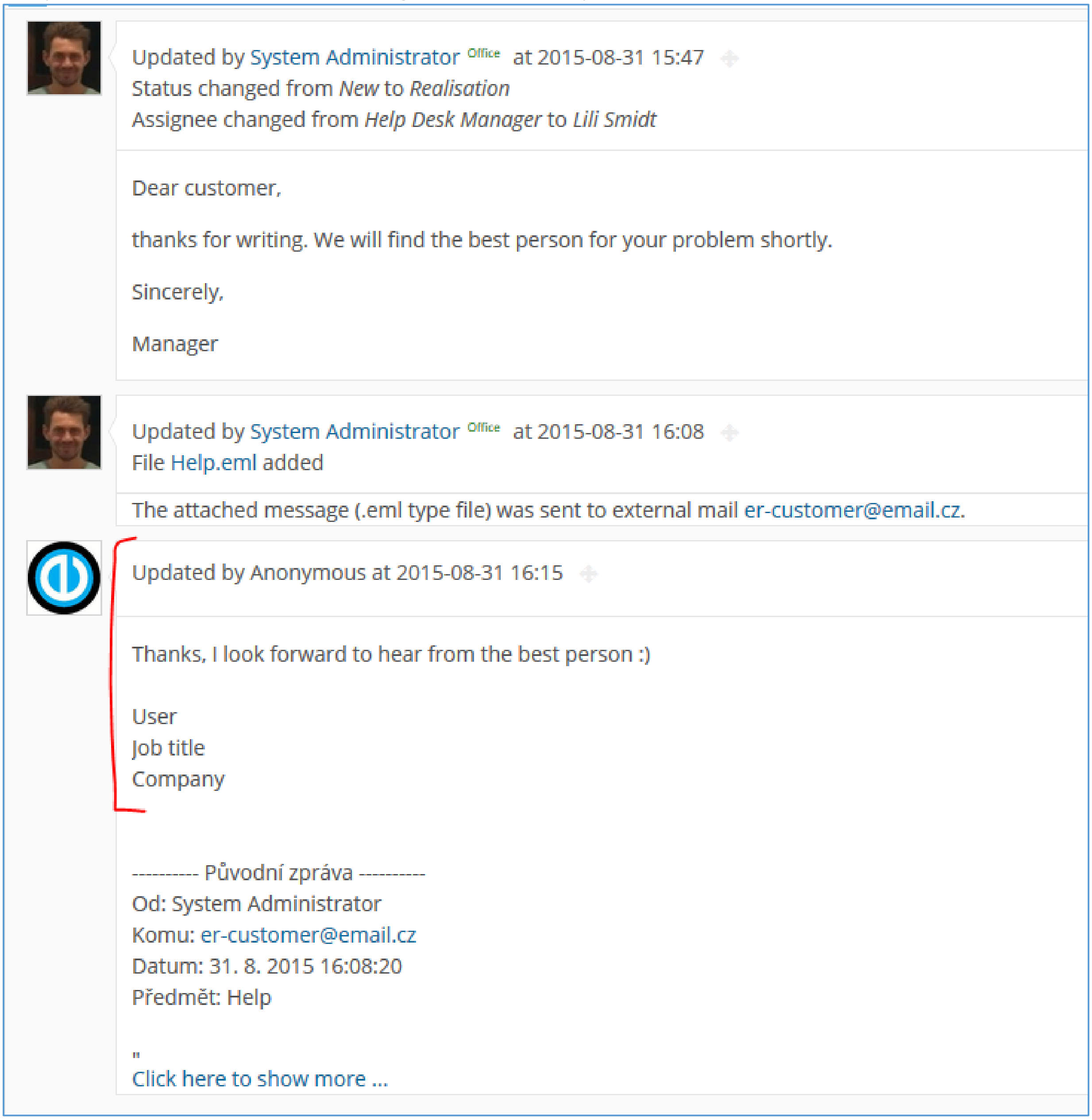
- Mail subject - custom or preset according to the mail template. By default it is populated by the ticket Subject
- Mail recipient - sender of the original email. If there were other recipients of the original email in the CC or TO, they will also be added into this field.
- Mail reply to - this is always the helpdesk mailbox to which the original email was sent
- Mail copy - you can add other recipients
- Mail body - if a template was not chosen, it will consist of the last comment on the ticket and the original email text. The content is editable.
- Attachments - you can choose attachments to send with the email. It may be some more recent emails or new files you uploaded when updating the ticket
- Send mail - email is sent to all recipients
- Don't send mail - you will return to the detail of the ticket

When we look back at the ticket detail, we see that SLA response has disappeared, because it was made.



5.1.4. Client replies back - how the emails are paired with ticket

Client has received your reply and replies back. The reply will be added as a comment from anonymous user (user who is not registered in the system).



Let's explain here how the client's reply found its way to the correct ticket.

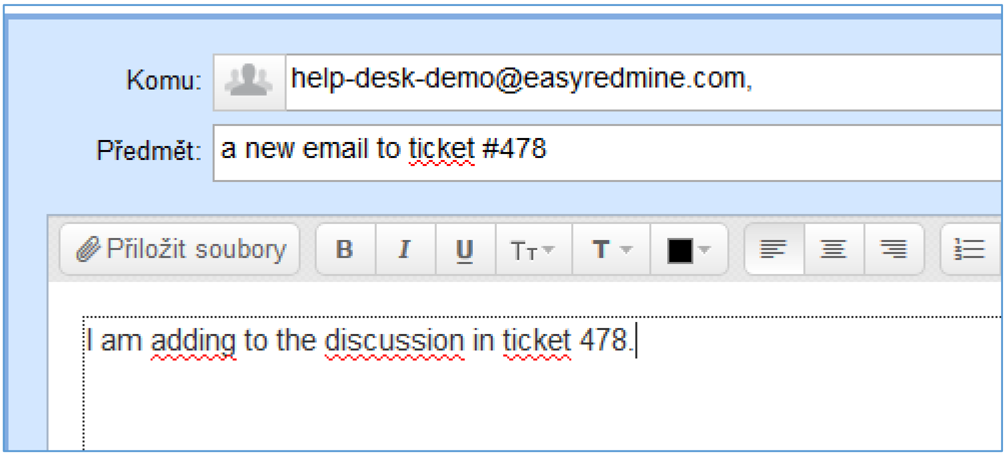
When, in the previous step, manager sent email to the client, the email contained a hidden heading (as all emails do) with the ID of the ticket. By replying to the email, this header was contained also in the client's reply and therefore helpdesk identified it and added the reply to the ticket with the same ID.

Here are all the ways received emails are paired to tickets in the system.

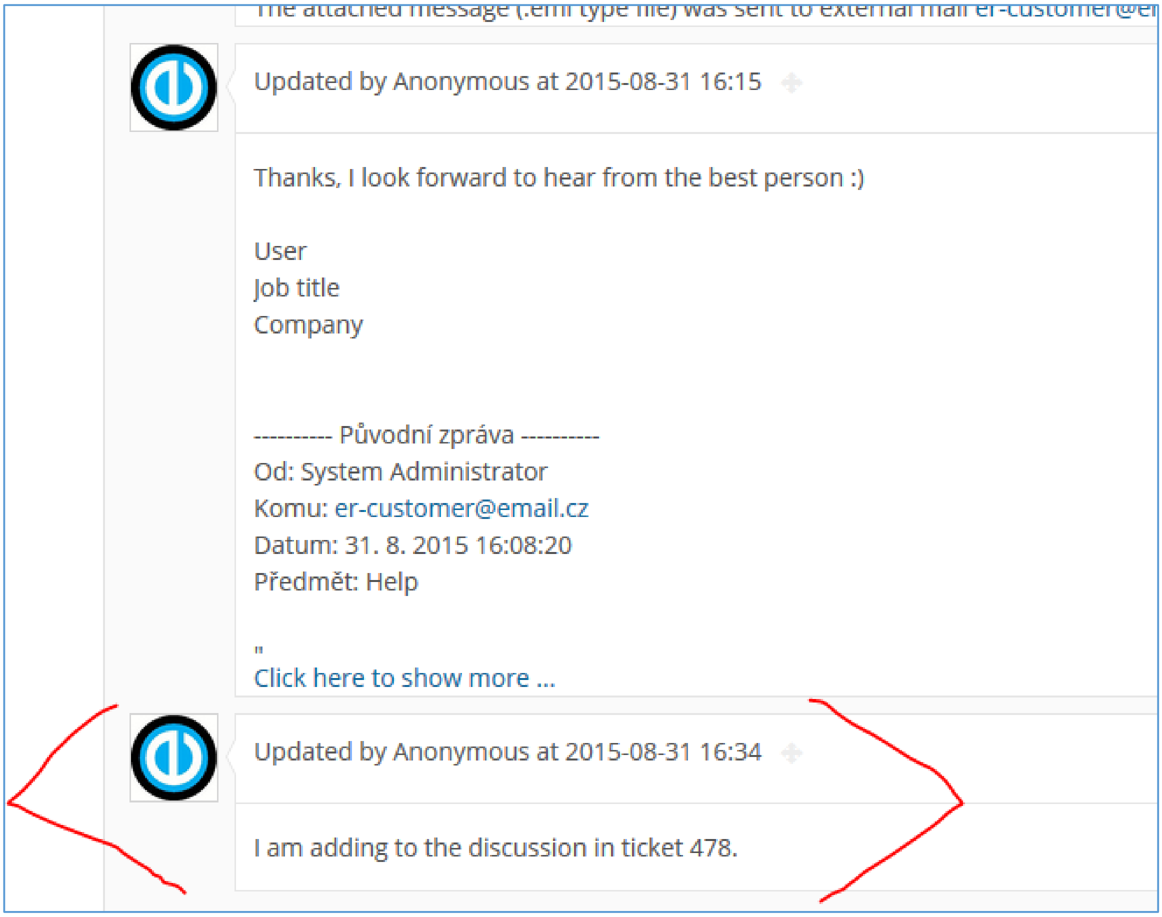
1. Hidden heading of e-mail, where the task ID is saved
2. Subject of the e-mail, where a combination of "#" and task ID is sought
3. If this isn't found, subject is searched for a number alone

Accordingly, even if the client writes a new email to a helpdesk mailbox and adds the ticket number (task ID) in the subject it will still be paired. Like in the following example.

New email to a helpdesk mailbox:



Subsequent note in the ticket:



5.1.5. Last reply - ticket gets closed

One last reply from the operator, with which the ticket is closed. After closing the ticket, SLA for resolve will also disappear from the ticket detail.

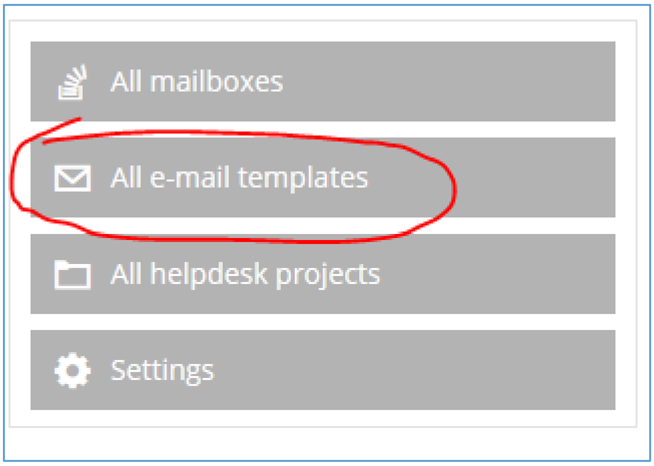
If the client replies again, ticket will be reopened to a defined status (this setting will be explained further).

5.2. Internally created tickets

If the client submits tickets by directly within your system, the workflow can be defined as if you were working with any other tasks. You will allow the client to create Help Desk Ticket or Bug. They will initially be in the default status (most time called simply New). Then communication goes back and forth between client and the operator by series of ticket updates and by **changing the assignee**, which is necessary to keep all users active in the communication. SLAs are monitored as in the email generated ticket Response: Change of status; Resolve: Closing the ticket.

6. Mail templates

Mail templates were already mentioned during the last chapter, but without a proper explanation of the processing, it would not be as easy to understand as it will be now. The last helpdesk menu item we haven't introduced.



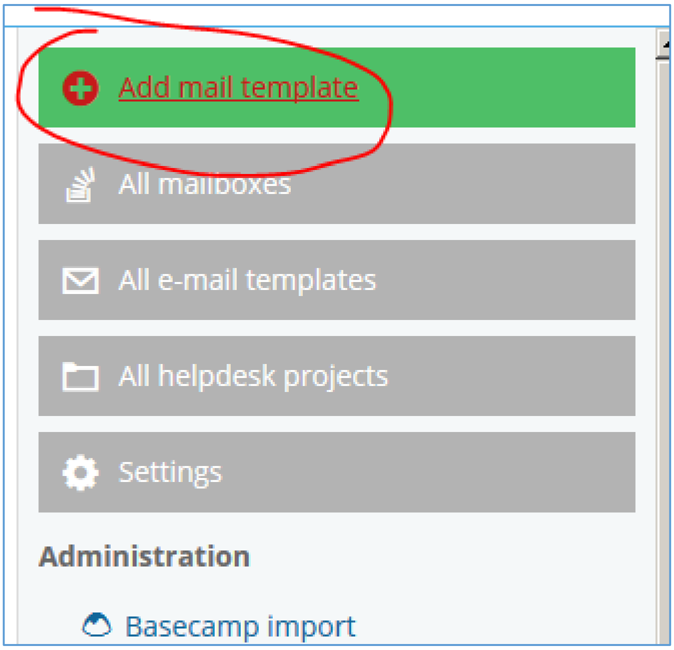
Email templates bring a certain level of automation and formalization of the communication with clients, by which they recognize your company as a professionally dealing one.

An important property of Mail templates is that **they are configured per mailbox,** you can't use a template from a mailbox IT@mycompany.com for emails sent to support@mycompany.com.

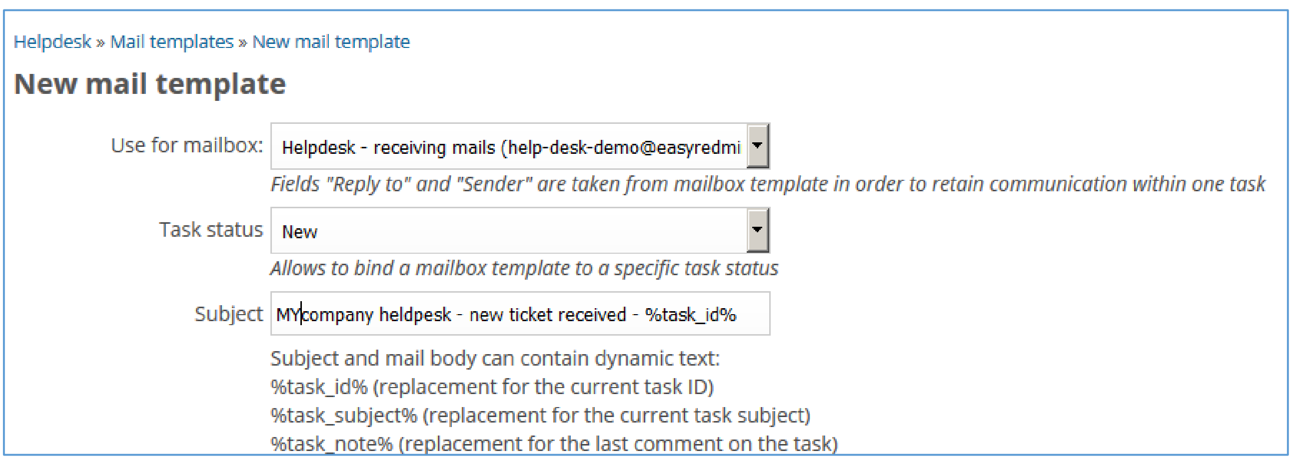
6.1. Creating a mail template

There are effectively two types of mail templates: autoreply and standard template. Because they are not configured differently, we will explain both cases at once.

6.1.1. Add new template



6.1.2. Basic attributes

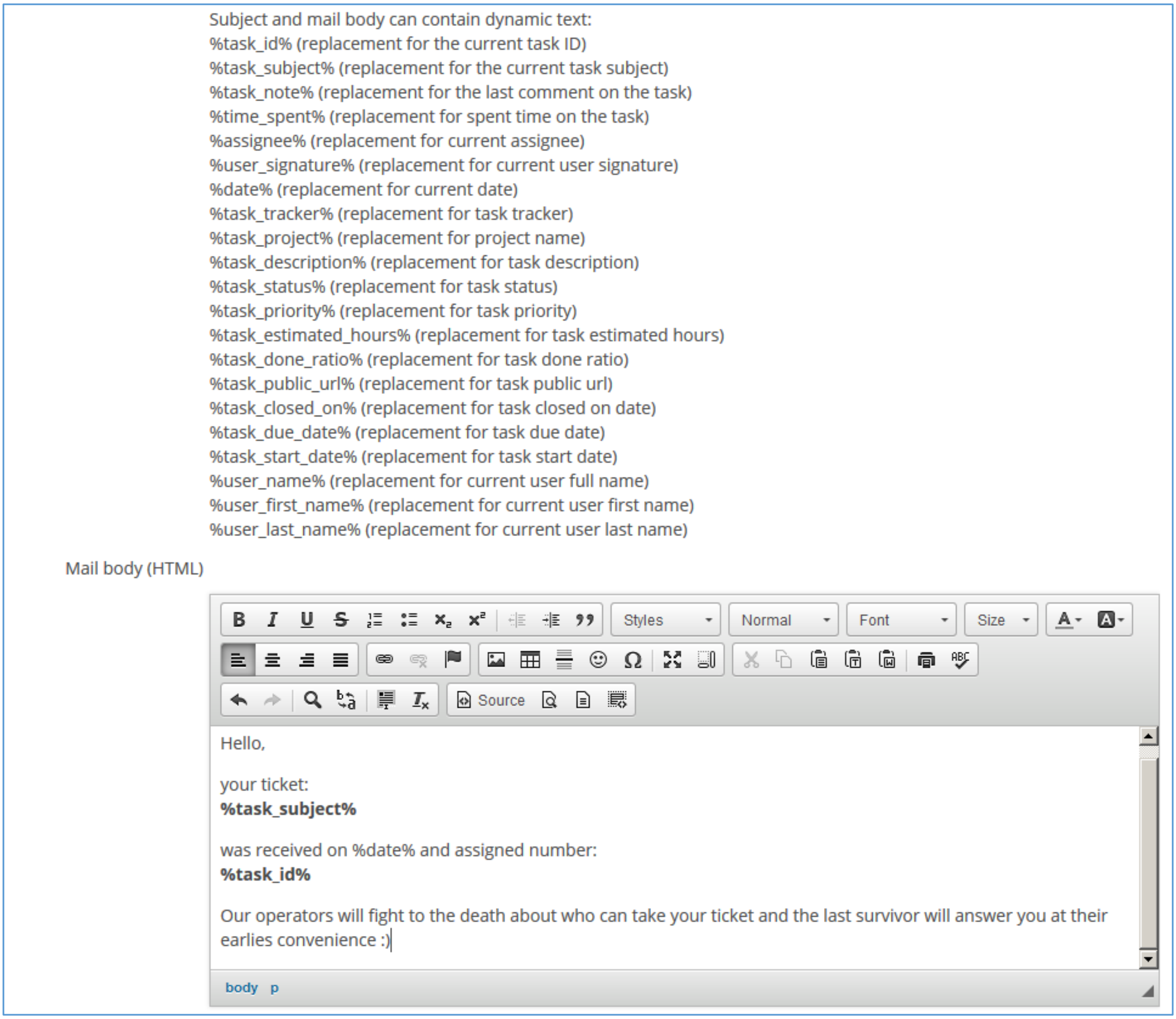


Setting notes:

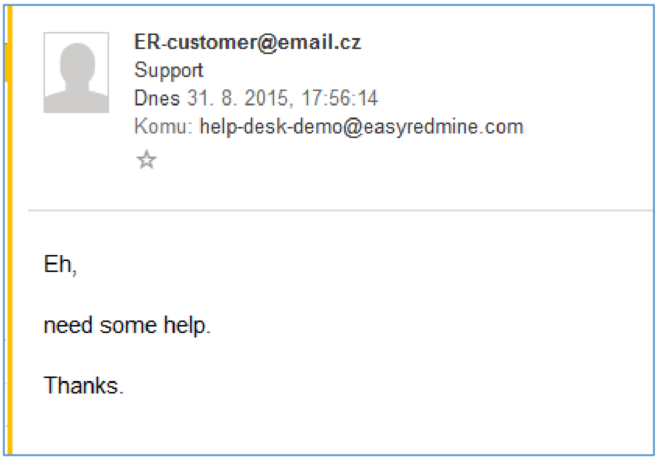
- Use for mailbox - which mailbox will have this template available
- Task status - according to this status, the template will be prefilled in the dialogue when sending the reply to external mail (see chapter 5.1.3.)
    - To use the template as autoreply to new created tickets from email, set the status to the default one (as configured in administration >> task statuses). In effect, when a ticket is created from an email, the autoreply according this template will be sent immediately. It can be used to confirm to the client that the ticket was created and what the next steps will be.
    - You may leave the status empty, in which case it will never be prefilled automatically in the send mail dialogue, but users will be able to choose it manually
- Subject - what will the subject contain
    - It is recommended to include the task ID in the autoreply - if you have many tickets with the same client, you will be better able to distinguish between them, when talking to the client
    - You may also use the actual subject used the client's original email

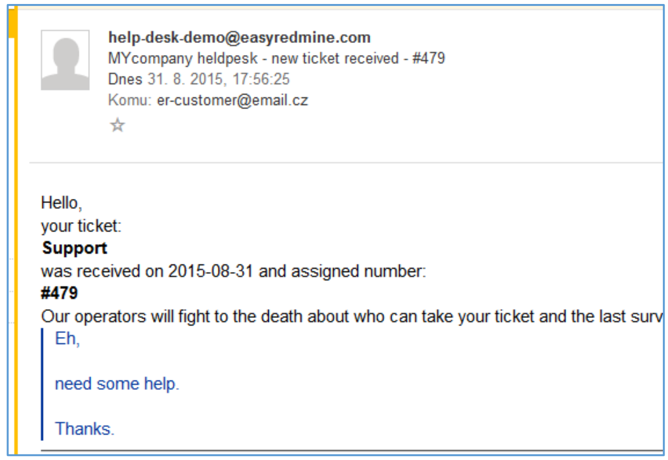
6.1.3. Dynamic tokens and mail body

Dynamic tokens can be used to provide particular ticket information to the client. In template they are entered as one of below, and in the email sent to the client, they will be replaced by the actual value from the ticket.



A simple example of an autoreply.

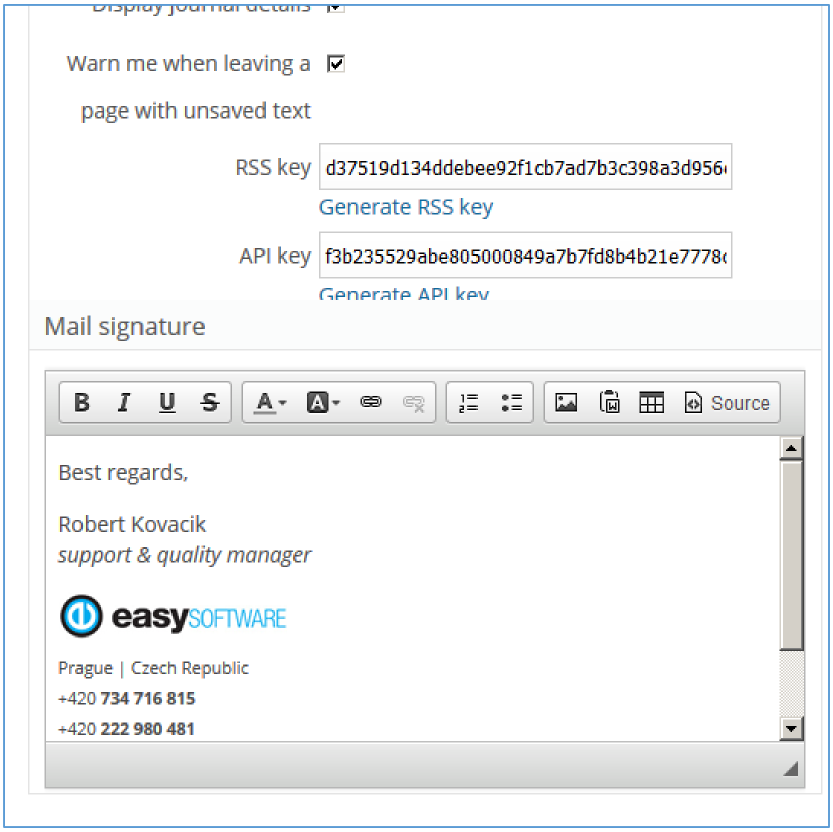




6.1.4. Important dynamic tokens

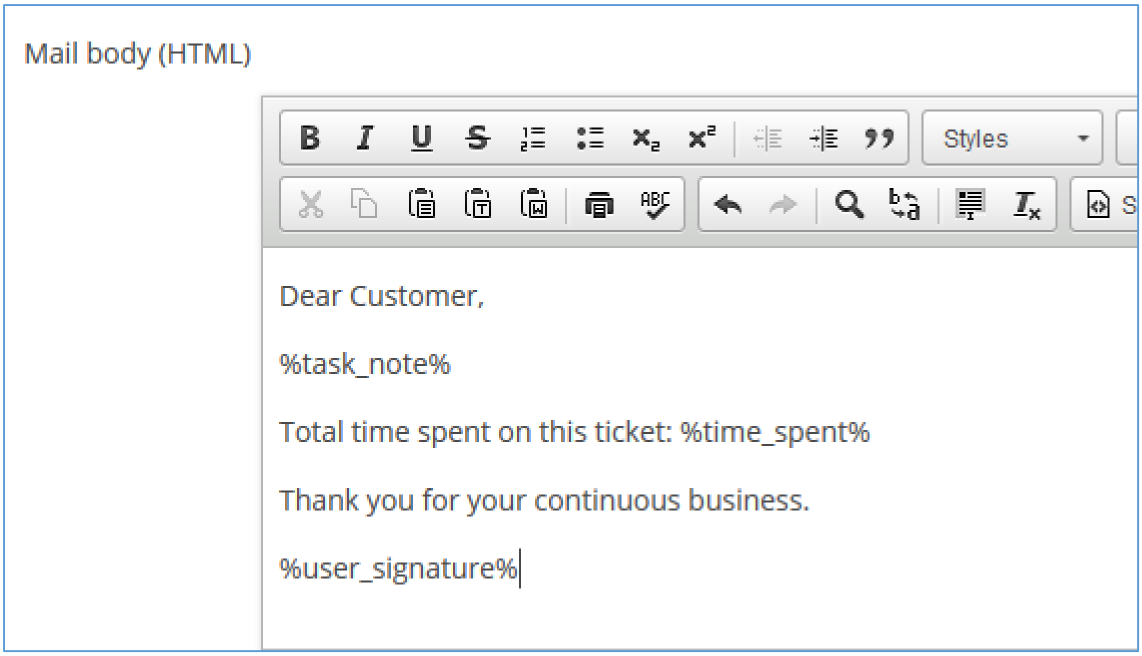
If you are going to use mail templates effectively, it is necessary to include the token **%task_note%** into the template. It will use the comment you last added to the ticket and surround it by the other text in the template.

To add corporate signature into the outgoing emails, use the token **%user_signature%.** It will use the HTML signature of the current user (who is updating the ticket) that can be set on user's profile.

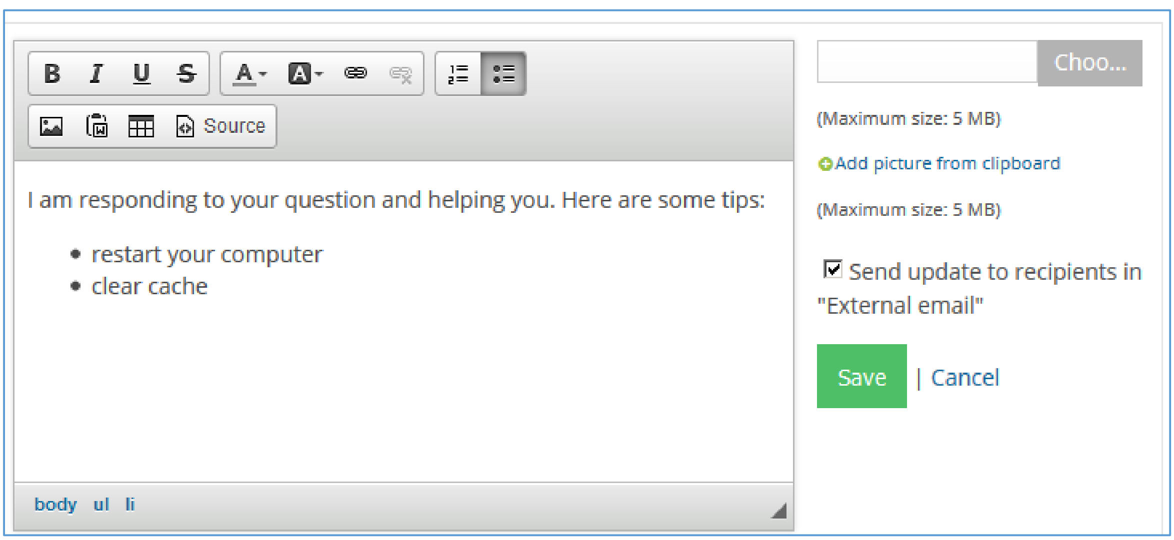


__Example:__ Let's devise a simple template containing comment of the support operator, total time spent on the ticket and company signature of the user.

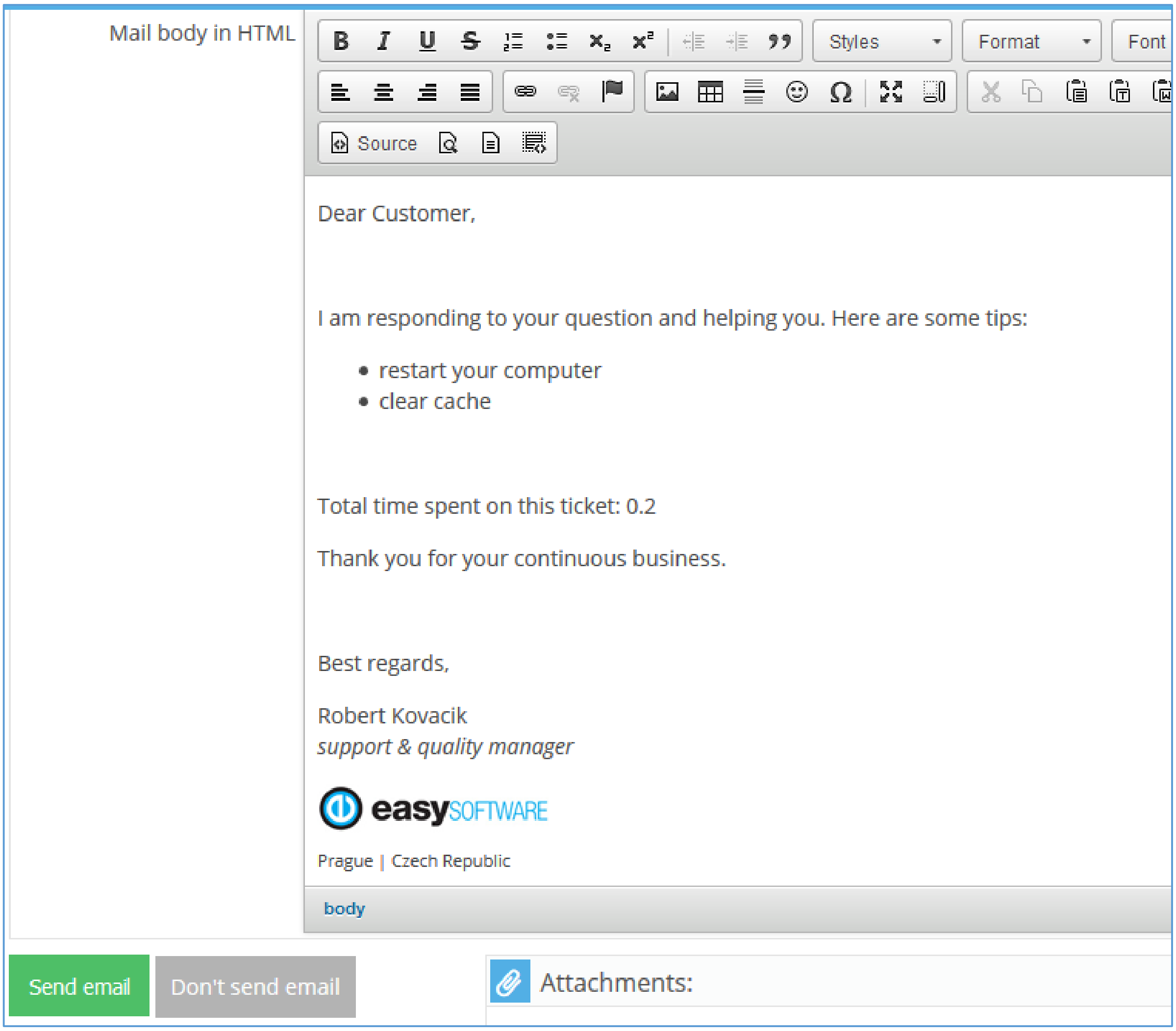
This is how the template looks like.



This how the operator writes the comment ticket update.



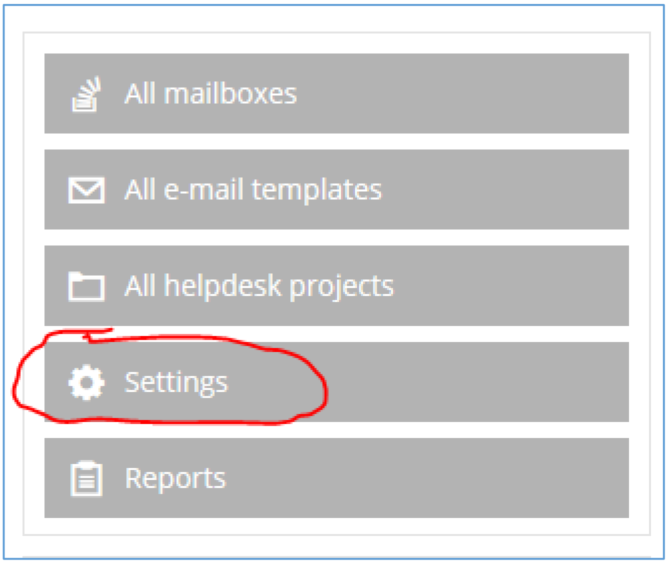
And this will be the sent email according to the template.

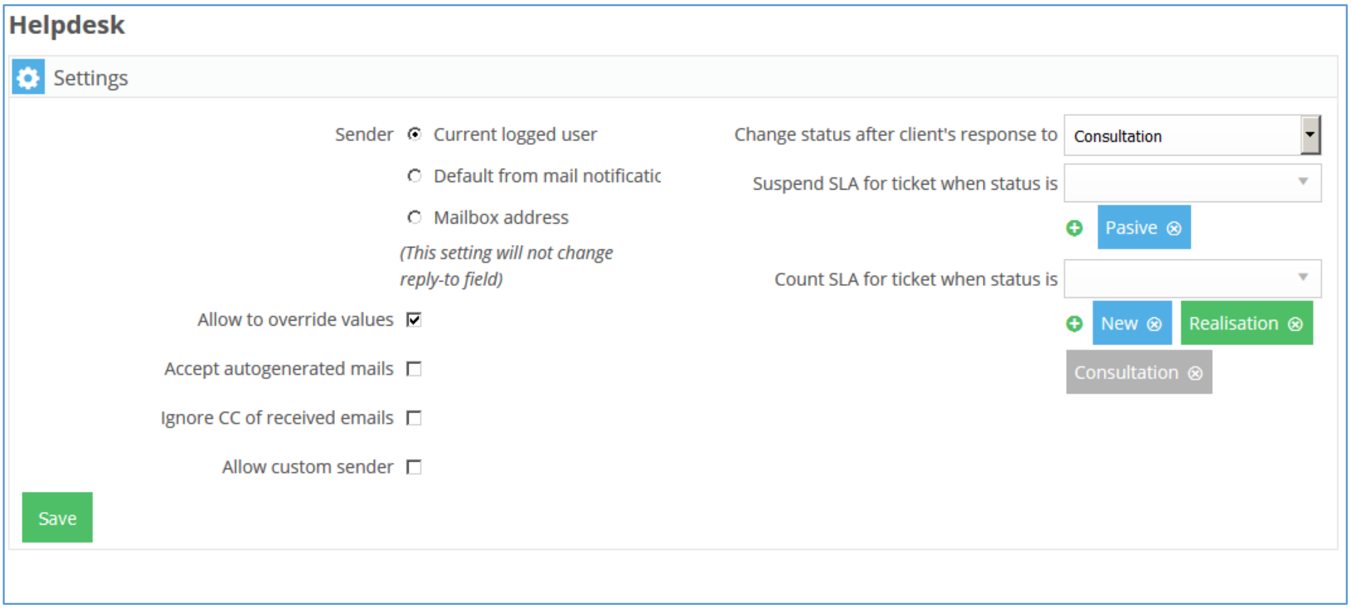


Note: When using email templates together with special heading and footing of emails on certain project (Chapter 4.3.), the project header and footer wrap the whole email send to the client, not just the email template, or just the part which added by the last comment.

7. Global settings

Now that we have gone through the whole usability, we can finish the rest of the settings that require explanation.





Setting notes:

- Sender - which email is listed as FROM on ticket replies to client (in relation to Chapter 5.1.3.)
  - Current logged user - user who is updating the ticket
  - Default from mail notification - email which is used to send standard notifications from the system to users. Set in Administration >> settings >> email notifications
  - Mailbox address - email, which received the original mail from the client
  - This setting is loosely tied to the last checkbox Allow custom sender - if enabled, you can set a custom email as the sender on project helpdesk settings. If a project has an email filled in the setting, it will override the Sender setting
- Allow to override values - if enabled, it is possible to change certain attributes on the ticket by email. For example, by writing *priority: High* in the mail body, you would change the priority accordingly. This is a rather advanced function and it is not recommended to use with clients
- Accept auto-generated mails - for example newsletters
- Ignore CC of received emails - if enabled, emails in the CC are not processed and used in the field External email of the ticket (Chapter 5.1.3. note about mail recipient)
- Change status after client response to - every time a client writes a reply which updates the ticket, status will be changed accordingly. This is particularly useful when tickets are put to a closed status after a reply was sent by the operator. Unless the client replies back with some additional question, the ticket will stay closed and hidden from the active listings. When the client replies, ticket would be reopen and back to active queue of open tickets
- Suspend SLA for ticket when status is - these are statuses, when SLA deadline is not determined, because the ticket is waiting for input from the client, without which the operator has no chance of providing support
- Count SLA for ticket when status is - when the SLA is normally measured. With these functions, you can nicely set the ticket cycle. For example, operator asks the client for more information, puts the status to *passive* and SLA is paused. After client replies, status is changed to *consultation* and SLA is recalculated according to the remaining time to SLA deadline, when the ticket was replied to.

Easy Redmine Can Help You With:

Basic Project Management
Project and tasks
Personal dashboard for work management
Project dashboard
Gantt chart for project planning
Project Management in mobiles
Project documents
Time tracking on projects, tasks, by users
Project templates
Quick project planner
Quick "to-do" reminders
Project Chat
Branded PDF exports
Project statistics
Project graphs and charts

Customer Management
Help Desk
CRM – Management of sales activities
Invoicing
Contacts

Finance Management
Project Budget and Cash-flow
Project Price Calculations and Quotations
Payroll and invoicing sheets
Transactions and personal finances

Resource Management
Resources
Attendance

Advanced
Agile Development (Agile board for SCRUM, KANBAN)
Project knowledge base
Meeting Calendar
Time sheets
Alerts – Early Warning System
Social Wall
Task Sequences
Custom fields formula
Marketing Automation